Cal**SAWS** | BenefitsCal Update
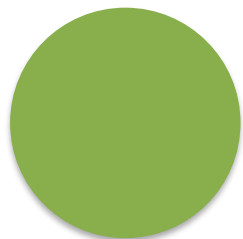## Self Service Portal Committee Meeting

DRAFT

April 27, 2021

Agenda

① Communications Strategy

② Communications

③ Training Discovery – Update

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Aspiration

To communicate the right messages to stakeholders, at the right time, to provide a **positive Customer-first experience** with the new BenefitsCal.

Through proactive communication, we can **build trust** and increase **long-term adoption**.

Communications Objective

These are the top objectives for the overall communications strategy for the BenefitsCal project:

1. To encourage, support, and sustain relationships with all stakeholders

2. To inform stakeholders of the activities and progress of the BenefitsCal project

3. To establish mechanisms for effective and timely communications to all stakeholders

4. To manage change

5. To build enthusiasm among users that will help drive adoption of the new system

6. To build pride and momentum for BenefitsCal within CalSAWS

Our Approach

To effectively build trust and increase long-term adoption of BenefitsCal, we'll leverage a centralized communications model.

With this model, BenefitsCal will lead the development of a statewide communications strategy and partner directly with Counties and Advocates to activate localized outreach campaigns. This approach enables BenefitsCal to:

- Pioneer communications strategies for the self-service portal
- Lead with a unified statewide message
- Manage brand and message consistency
- Mitigate brand risk and measure success statewide
- Empower partners to launch and manage outreach communications customized at the local level

We believe that a centralized outreach model will

D E L I V E R A U N I F I E D E X P E R I E N C E

Communications Strategy

We'll leverage a centralized multi-channel communications strategy to drive adoption of BenefitsCal and #EngagePeopleBetter with hyper-targeted messaging to the right people at the right time.

Key tenets of the approach

Lead with Value	Data-Driven
Craft communications that lead with the value statement for the targeted audience.	Use data to drive the plan, share the right information with Customers at the right time.
Keep It Simple	**Timing is Everything**
Communicate with Customers at their reading level and in their preferred language.	Send Customer communications at the right time, in segments, based on the Customer's benefits status.

Communications

Tactics

Direct Emails
Direct Mail
SMS Text Messages
Social Media Toolkit
Flyer, Handouts, Brochures
Briefing Packets
Swag
Call Center Materials
How-To Videos
Helpful Training Materials
Community Event Toolkits
*Social Media Content / Paid**

Messages & Campaigns

Awareness
Education
Adoption
Retention

Channels

CalSAWS Consortium
Counties
County PPOCs/IPOCs
Social Media

Message Categories

Key messages for different phases include awareness, education, adoption, and retention.

	Examples	Tools	
1 Awareness	• What is BenefitsCal • Who can use it • When is it available • Where can I find it	• Organic Social Media • Paid Social Media* • Paid Search * • SEO	• Community Event Toolkit • Lobby Toolkits
2 Education	• How do I get started / create an account • Training Materials • Key Facts (# of apps, Customers)	• Social Media Toolkits • Direct Mail • Briefing Packets	• Mass Email • SMS Outreach
3 Adoption	• Call-to-action (Log in today) • What do I need to do to log in • FAQs	• SMS Outreach • Mass Email	• How-to Videos • Training Guides/FAQs
4 Retention	• Post go-live emails and encouragement • Surveys to learn more • Renewal Reminders	• Surveys • Mass Emails • SMS Reminders	

Campaign and Content Proposal

Based on the analysis, 4 campaigns are proposed.

What is a Campaign?

- A campaign is an **organized, strategic effort** to promote a specific goal.

- Campaigns are also **more than just marketing -** they include many activities to bring about an outcome (e.g., events, roadshows, trainings, etc.).

- Campaigns typically work to reach Customers in a **variety of ways** (e.g., not just emails).

- Effective campaigns are **focused on a specific goal** or idea and include **measurable outcomes**.

- The **measurable results** of the first campaigns will be used to **inform and/or adjust future campaigns**.
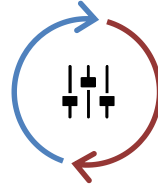
Campaigns

Awareness
Get as many potential Customer eyes on BenefitsCal as possible.

Internal Education
Educate people about BenefitsCal so that they are confident to support Customers and CBO questions.

External Education
Inform Customers what BenefitsCal is and how it can help them.

Adoption
Call to Action: Encourage Customers to log in, get started, and to apply for or maintain benefits.

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Timing of Campaigns

Timing is everything. Using Customer and case data, we will time the communications and segment them by stakeholder group and application/case status.

> **Customers will be nudged to complete unfinished apps.**

> **This will help us to manage expectations and lower the risk of the September go-live.**

> **Customers with action needed (Renewal) will be invited to log in first.**

System	Stakeholder Groups
C4Y	O/FBO Authorized Representatives: C4Y
YBN	O/FBO Authorized Representatives: YBN
C4Y	Caseworkers: C4Y
YBN	Caseworkers: YBN
C4Y	Customers: C4Y Unfinished Applications
C4Y	Customers: C4Y Upcoming Renewal
C4Y	Customers: C4Y Frequent Users
C4Y	Customers: C4Y Others
YBN	Customers: YBN Unfinished Applications
YBN	Customers: YBN Upcoming Renewal
YBN	Customers: YBN Frequent Users
YBN	Customers: YBN Other
Both	Advocacy Groups
Both	Country Welfare Directors Association
Both	Legislature
C4Y	Call Center: C4Y
YBN	Call Center: YBN
Both	Labor Organizations (SEIU, others)
Both	State Agencies/Departments (HHS, DHCS, CDSS, OSI)
Both	Program and County Administrators
C4Y	IPOCs/PPOCs
YBN	IPOCs/PPOCs
Both	Office of Inspector General (OIG)
Both	Federal Government
Both	Universities
Both	School Districts
Both	Community Health Clinics
Both	Health Insurance Exchanges Navigators
Both	Dept of Labor / Office of Unemployment
Both	Child Support Program
Both	Child Care Assistance Program
Both	Food Pantry/Food Distribution

KEY: Awareness, Education, Adoption, Retention

Planning BenefitsCal Communications

BenefitsCal Communications Inventory

Communications
Strategy

Communications
Inventory
(refer to appendix
A for all details)
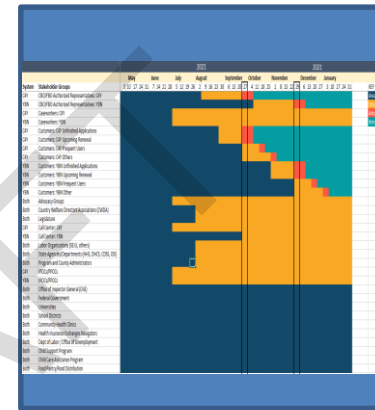
Campaigns
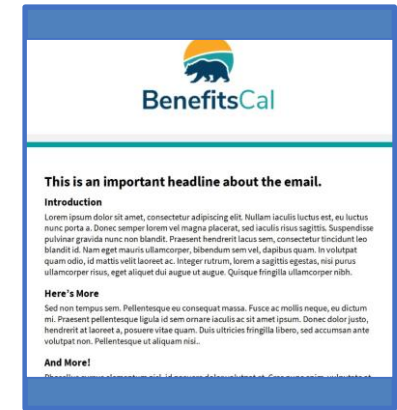
Communications

Customer and CBO Communications (Example C4Y)

Go-Live
09/27/21

Post Go-Live Follow
Up
10/27/21

New Benefits
System 3
08/27/21

New Benefits
System 1
06/27/21

New Benefits
System 2
07/27/21

Submit your
BenefitsCal
application
08/30/21

Go-Live
Announcement
09/27/21

Log in to the New
System (Frequent
Users)
10/11/21

June   July   August   September   October

08/24/21
Prepare for
BenefitsCal
Physical Letter

09/27/21
Reminder Your
Renewal is Due

10/18/21
Post Go-Live Survey

Legend
—— CBOs
—— Customers & CBOs
—— Customers
(Conditional)

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County & External Stakeholder Communications

Go-Live
09/27/21

Social Media
Toolkit
05/10/21

Project Design
Factsheet
05/24/21

New Benefits
System 1
06/27/21

Submit your
BenefitsCal
application
08/30/21

Go-Live
Preparation
Factsheet
09/17/21

Post Go-Live
Update
10/27/21

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May

June

July

August

September

October

05/24/21
Project Awareness
Toolkit

08/15/21
Briefing Packet
Deck

09/06/21
Quick Start Guide

09/27/21
Internal Go-Live
Announcement

Communications

We are looking for your feedback

Files are available here for review:

WebPortal > Teams Document > Portal Documents > CalSAWS Portal

https://calacesorg.sharepoint.com/sites/MigWebPortal/Team%20Documents/Forms/AllItems.aspx?viewid=d7eb4d3c%2D12c4%2D45ae%2D8249%2Df8f0124b71ed&id=%2Fsites%2FMigWebPortal%2FTeam%20Documents%2FPortal%20Documents%2FCalSAWS%20Portal%2FCommunications

Training Discovery

We asked stakeholders: what would be most helpful to you to support the user of BenefitsCal?

Discovery Sessions
04/13/21 Regional Managers 04/15/21 Training Committee 04/14/21 Consortium Workgroup 04/29/21 *(Upcoming)* Advocate Monthly Review 05/09/21 *(Upcoming)* Consortium Training Committee

We asked four (4) questions
1. What are the most frequently asked questions from Customers when using the current Portals? 2. What format would be most helpful for training materials for Customers? 3. Based on your experience assisting portal users, what training topics would you (Caseworkers, Counties) want to see for BenefitsCal? 4. What format would be most helpful for training materials for you (Caseworkers, Counties)?

Training Materials for **Customers**

Videos were the clear winner...

Short Videos (1-2 min)

Written How-To Guides

Frequently Asked Questions

add features to call center recording about bencal

teaching the eligibility staff so we are able to explain to our customers.

Something Else...

Guided overview during intake /application

Quick tip card maybe?

Training Materials for **Staff**
Written materials were the preference, though videos also helpful...

Short Videos (1-2 min)	Written How-To Guides	Recorded Training Sessions	Training Course in the LMS	Something Else...
	Screen Shots!			Frequently asked questions flyer to address any new findings or problem areas staff are encountering
	Screenshots			flyers to highlight features of the portal
Up to five min				

Summary

Here are the highlights of what we learned...

Customer Training Needs

- How do I recover my **password**?
- How do I **upload** a document?
- How do I know that you **received my document**?
- What's the **status** of my application/case?
- How do I **sign** or **submit** my application?
- How can I **see my case information**?

Customer Channels

- **Most popular channel:** Videos
- **Most common request:** "Show me"

- Insight: Customers want to see how to perform an action, not read about it.

Staff Training Needs

- How **customers report a change.**
- How to **see documents** after they are uploaded.
- How **documents** are **uploaded**
- Staff **knowledge of BenefitsCal** overall
- **How to** assist customers ....with external screenshots
- How a **CBO Manager/Assistor accounts** get set up/approved
- Staff **understand** what they can do to help, **expectation**

Staff Channels

- **Most popular channel:** Written Guides
- **Most common request:** "Bite-size, please"

- Insight: Front-line staff need the ability to reference a document, while on the phone with a customer. They cannot watch a video.
- Materials need to be very easy to find, small bite sizes.
- Insight: Front-line staff would like to be able to send customers a link to a video as a follow-up.

Training Plan – **DRAFT**
Inventory of Proposed Training Materials – to be finalized

18 Videos

20 Quick Reference Guides

1 User Guide

5-6 Scenarios to try in the Training Environment

Question for the Committee

How should we track the training of internal stakeholders? By view? With a quiz? Other?

	Caseworker Training	Administrative Staff	Clerical	Call Center	Others
County A	93%				
County B	5%				
County C					
County D					

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Training Next Steps
Upcoming Activities

Next month we look forward to sharing…

- Training insights

- Training Recommendations

- Training Plan – Inventory of videos and QRGs finalized