



PLENARY SESSION 1

DATA IN HARMONY:
HOW ANALYTICS IS HELPING US
HEAR THE WHOLE STORY



SANDEEP AJI

CalSAWS Chief Technology Officer
Lead Singer



FEAT: ARIANA MICHEL

San Bernardino County
Trumpet



FEAT: JIE CHEN

San Francisco County
Double Bass

PLENARY SESSION 1: PRESENTER ENSEMBLE

INNOVATION NATION



How Analytics are Helping Us Hear the Whole Story

From disconnected signals to a single, trusted story

Applications

Cases

Operations

Fiscal Data

Customer Facing Channels





Background

Challenge

County Perspective

Vision, Capability, Conceptual Future State (Video)

County Panel Discussion

Next Steps

Key Takeaways and Close

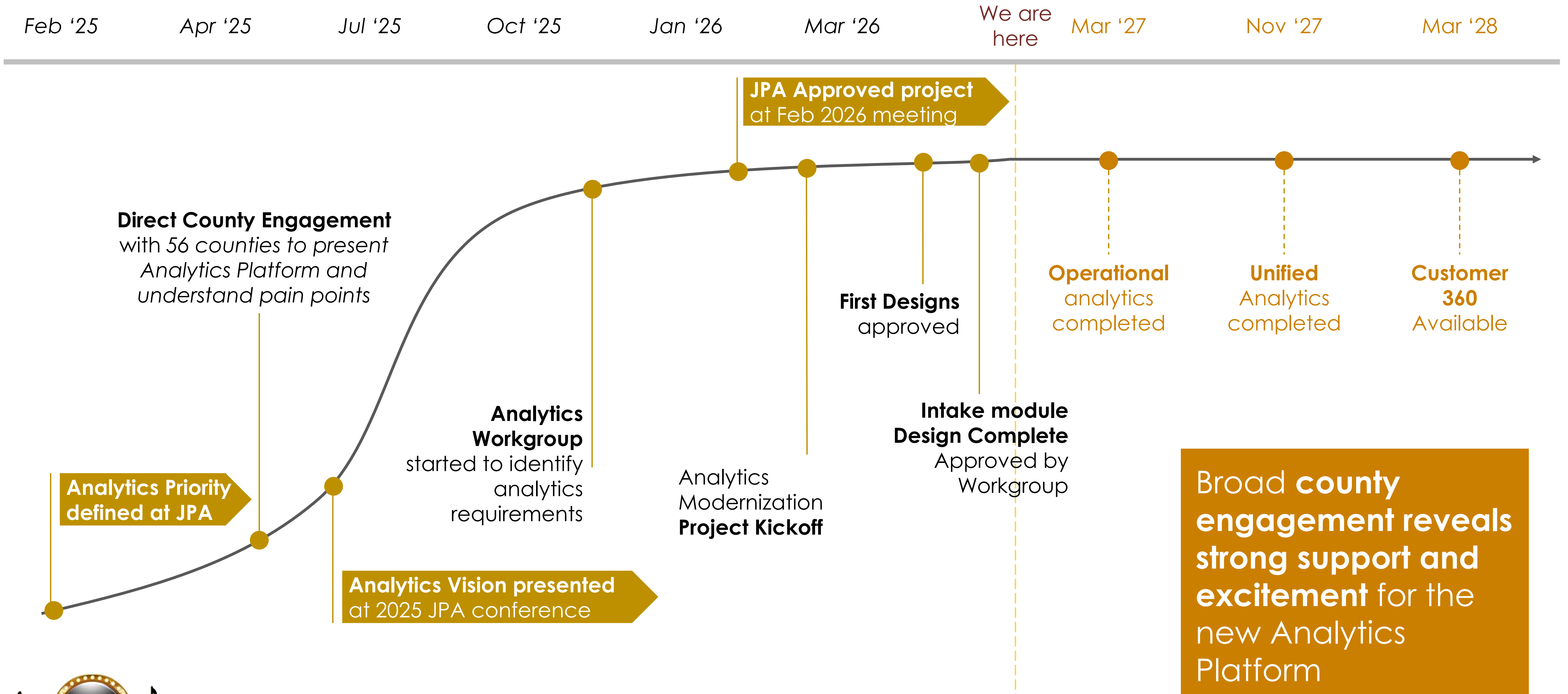


BACKGROUND

LAYING THE GROUNDWORK FOR THE ANALYTICS PLATFORM

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Several **targeted actions taken last year starting Feb 2025** to ensure implementation is set up for success.



Broad county engagement reveals strong support and excitement for the new Analytics Platform

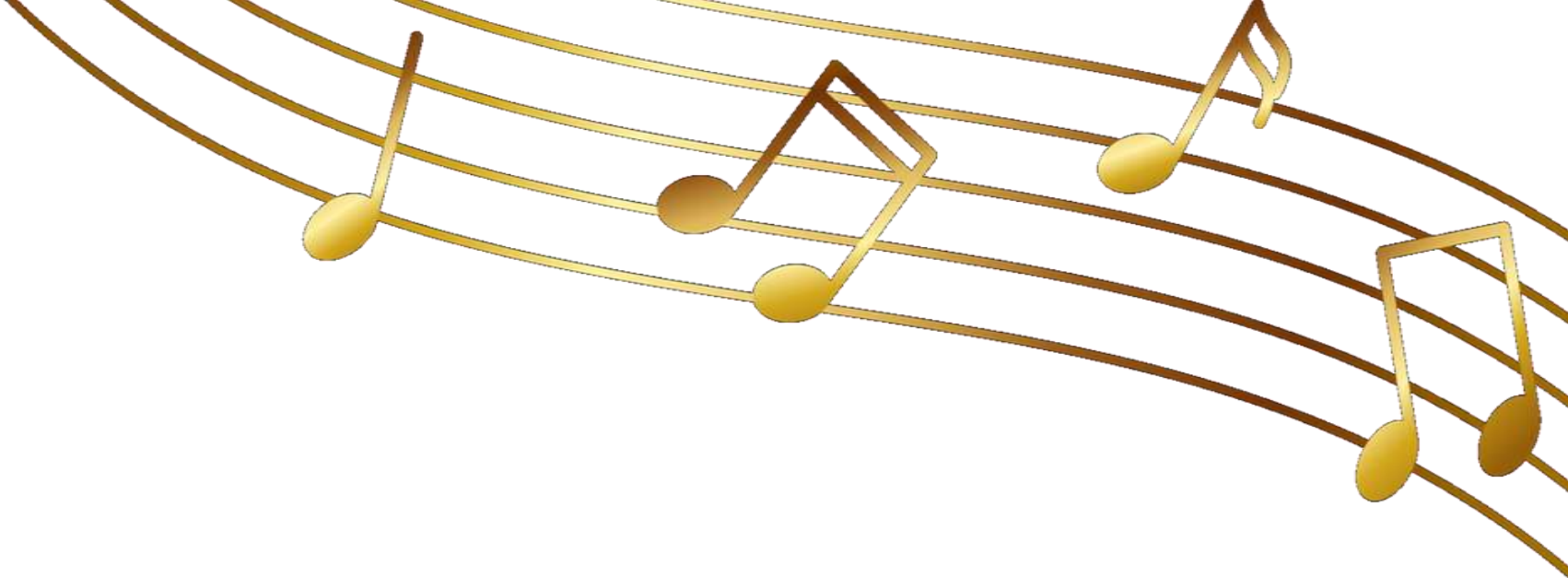




CHALLENGE

The Challenge: Fragmented Data Across Systems

Each system captures a valid signal, but no signal tells the whole story



B **BenefitsCal**
Applications, renewals,
account activity

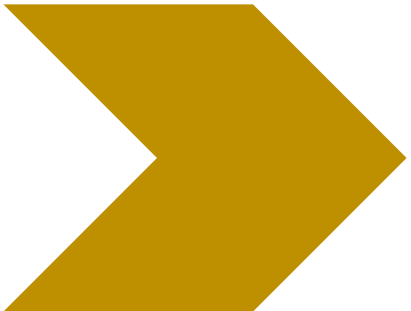
C **Contact Center**
Calls, statuses, support
interactions

L **Lobby**
Walk-ins, staff touchpoints,
service support

I **Imaging**
Documents, verification,
case evidence

What happens today

- Teams reconcile separate reports manually
- Definitions and counts do not always line up
- Time is spent stitching together context before analysis begins



Operational impacts

- Slower decision-making and delayed response to trends
- Harder to understand the customer journey across channels
- Limited ability to see workload, fiscal effects, and outcomes together
- More effort spent validating data instead of using it





SAN FRANCISCO: WHAT IT TAKES

WHAT IT TAKES TODAY TO PIECE THE DATA TOGETHER

San Francisco: to align staffing with demand, the county had to manually connect contact center, lobby, and workforce data across multiple systems



TODAY

The Business Need

- ♪ Understand whether staffing and scheduling matched actual demand
- ♪ Right-size coverage across contact and service centers during operational change
- ♪ Increase productive task time while meeting performance targets

Development of a staff scheduling model that is more responsive to dynamic business conditions:

- ♪ Fluctuating workforce size and language need
- ♪ Shifting client channel preferences
- ♪ Navigating system changes (e.g., major transition from CalWIN to CalSAWS)

Who benefits: Managers • Frontline Staff • Beneficiaries

County takeaway: “The positive impact we make on our clients and staff depends on our ability to quickly and clearly see information through the lenses that matter most.”



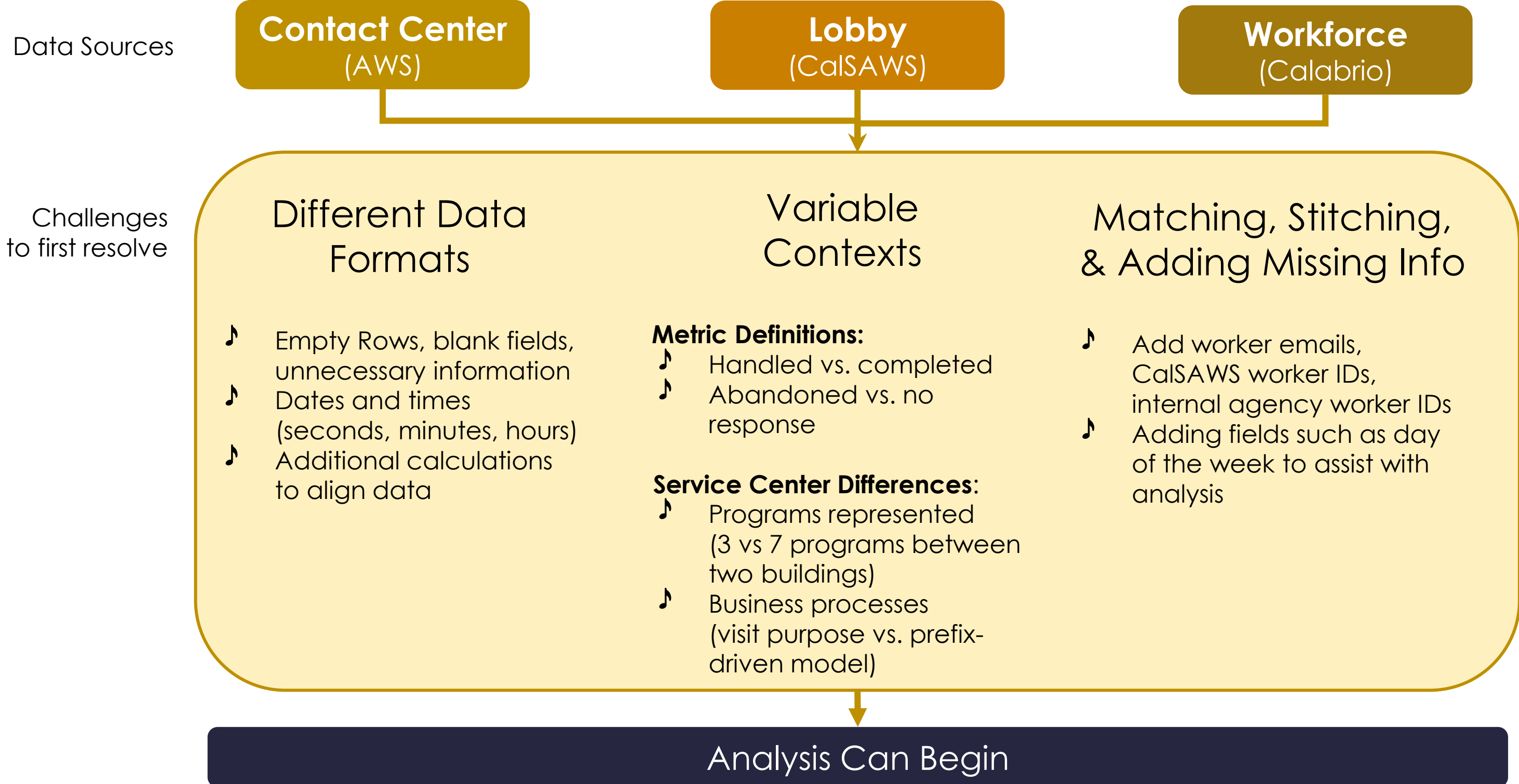
WHAT IT TAKES TODAY TO PIECE THE DATA TOGETHER

San Francisco: to align staffing with demand, the county had to manually connect contact center, lobby, and workforce data across multiple systems

IMPACT

Manual Effort Required

- ♪ Pull data from multiple systems and reports
- ♪ Clean, reformat, validate, and re-upload data before analysis
- ♪ Stitch together missing worker, staffing, and service-center context



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FUTURE

What Unified Data Would Improve

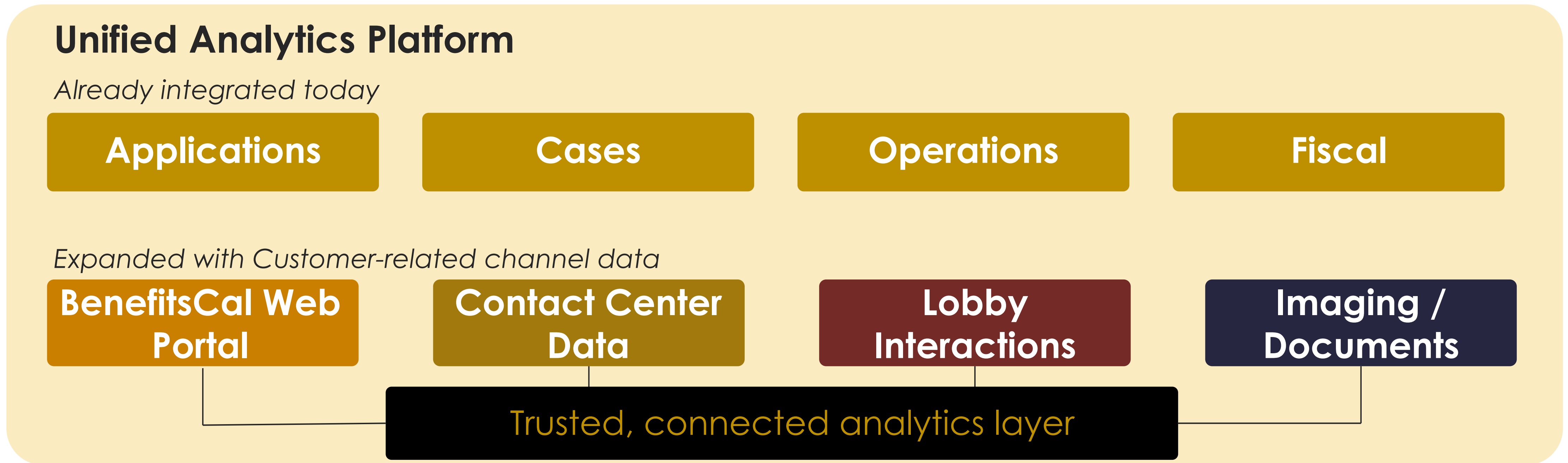
- Faster extraction, validation, and analysis
- Faster evaluation of scheduling strategies and results
- Less time assembling data and more time improving service and staffing

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Existing integrated foundation + new channel data = more complete insight



Why the unified platform matters

For business users and county leaders

One trusted view across programs and channels. Faster answers, fewer reconciliations, and clearer understanding of customers, workload, and service demand.

For analysts and power users

Cross-channel and cross-program analysis in one place. Connect journeys, documents, workload, outcomes, and fiscal impact, and surface patterns siloed reporting hides.



When BenefitsCal, Lobby, Contact Center, and Imaging data are added to the existing Applications, Cases, Operations, and Fiscal foundation,

Counties can answer new cross-channel questions they could not reliably answer before.

Customer Journey and Access

See how people move across online, phone, in-person, and document touchpoints, where they start, where they stall, and where staff intervention helps complete service.

Service Demand and Workload

Connect channel demand to case activity and document flow to understand why call spikes happen, which visits are avoidable, and where workload shifts across offices and teams.

Verification and Processing Bottlenecks

Relate document submission, imaging turnaround, pending reasons, and eligibility timing to find where verification slows approvals, renewals, or case actions.

Outcomes, Equity, and Fiscal Impact

Compare channel journeys and service patterns with approvals, churn, renewals, program participation, and fiscal effects to see which operating changes improve outcomes.





SAN BERNARDINO: REPORTS TO INSIGHTS

SAN BERNARDINO COUNTY

Background and Metrics

20K
Miles

2.2M
Residents

County

Geography

20,105 square miles

Population

2,216,685

865,720

Individuals
served

Department

Transitional Assistance
Department (TAD)
(as of May 1, 2026)

Program Type	Case Count
CalWORKs only:	2,914
CalFresh only:	155,895
CalWORKs and CalFresh combo:	24,582
Medi-Cal:	418,283

21
Offices/Sites

Call Center

Task based model and
Call Center started
August 2011
(15 years this year)

Public-Facing Offices

19

Call Center sites

3



SAN BERNADINO – COUNTY PERSPECTIVE: WHAT WE CANNOT SEE WHEN CHANNEL DATA IS FRAGMENTED

BenefitsCal, Contact Center, and Lobby each show part of customer demand — but not the full operational picture



Who benefits: Leadership • Managers • Beneficiaries

County takeaway: “Reliable, timely data helps us make better staffing and service decisions across channels.”



VIDEO:
CUSTOMER 360
FROM REPORTS TO INSIGHTS



What if one view connected **everything**?

Applications. Cases. Operations. Fiscal.
And every channel a resident uses to reach you.

CUSTOMER 360 VISION

Customer 360 connects application, service, document, and participation signals to reveal insights counties could not see before

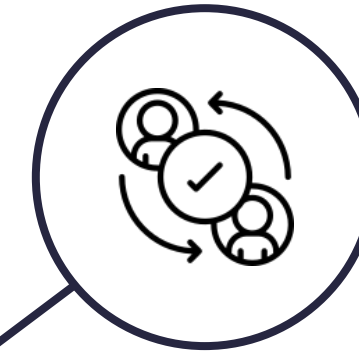
Applications

Which households start online but then need staff help before a case is resolved?



Service Interactions

Which customers make repeat calls or lobby visits after key application or document events?



Customer 360

Counties Get the Whole Person View

Program Participation

How do channel journeys relate to enrollment, renewals, churn, or multi-program participation?



Documents and Verification

Where do document or verification bottlenecks correlate with pending, denied, or delayed outcomes?



Channel Management

How do I assign my resources based on channel journeys ?



PANEL DISCUSSION





FEAT: ARIANA MICHEL

San Bernardino County

Trumpet



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Double Bass

SPECIAL GUESTS

UNIFIED ANALYTICS HELPS COUNTIES MOVE FROM FRAGMENTED SIGNALS TO CLEARER ACTION

- ♪ Customer-related data today is spread across web portal, contact center, lobby, and imaging systems.
- ♪ A unified analytics platform brings those fragments together into a more trusted, usable decision environment.
- ♪ Integrated data supports faster insight into beneficiaries' trends, eligibility trends, workload, fiscal impact, and program outcomes.
- ♪ Customer 360 is the next step toward understanding the full customer and household story across channels and services.

Data in Harmony

*Hear the whole story.
Act with more confidence.*



WE'D LOVE TO JAM WITH YOU!



ANY QUESTIONS ABOUT
DATA IN HARMONY?





THANK YOU
FOR ATTENDING!

SET BREAK

BACK AT 11:00 AM FOR
BREAKOUT SESSIONS
1 AND 2

