



Integrating Innovative Employment & Economic Stability Strategies (IIEESS) Webinar Transcript

Peer-To-Peer Learning Opportunity: Environmental Changes to Boost Client Success

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TINA SMITH: Hello everyone. Welcome to today's webinar, Environmental Changes to Boost Client Success. My name is Tina Smith and I will be your moderator for today's webinar. Before we get started, I want to review a couple of housekeeping items with you to explain how the participation for today's session will be. When you joined in today's call, you may have noticed that you have been placed in listen only mode. If you have questions you would like to be presented to address, please submit them to the Q and A box located on the right-hand side of your WebEx window. When you logged into the webinar today, your screen should have looked like the area on the top right of my slide. In the middle of this screen, you should see a section where you can chat or submit questions. Even though both sections are available to you, please only submit your questions through the Q and A box only. You also have the ability to change the view on your screen. To change your view, please select the full screen icon button located in the top right hand corner, the same window as your presentation. You can see the arrow pointing on my slide. To exit full screen mode, hover your mouse over the full screen icon button again to adjust your view. For today's webinar, we will be using a "raise your hand" interactive feature. During your Q and A portion of the webinar, you will have the opportunity to verbally participate using this option. When you're ready to speak, please select the small hand icon located in the bottom of your participation box on the right side of your screen. You will then be called and unmuted to engage in the webinar. Please note that today's webinar will be recorded. If you experience any difficulties during the webinar, please call the WebEx customer service number at 866-229-3239, option one. Today we will offer a tip sheet for all the participants to download, so please hold onto at the end of the presentation so you are able to download the form from us. Now I'd like to introduce our presenter for today, Ms. Caitlin Smith. Ms. Smith serves as the Director of Housing in Redevelopment and Mobility Mentoring Service for EMPATH. She has years of experience in housing-based programming for low income families with a demonstrated history in developing strategic partnerships through collaborative planning and implementation. At this time, I would like to give the floor to Ms. Caitlin Smith for her to begin the presentation. Ms. Caitlin, you are free to go and start the presentation.

CAITLIN SMITH: Thank you very much, Ms. Tina. Good afternoon, everybody. So today's webinar is called Environmental Changes to Boost Client Success. And as Tina just introduced me, I'm the Director of Housing Redevelopment and Mobility Mentoring Services here at EMPATH and I'll be presenting a few of the webinars on this IIEESS project. So the purpose of today's webinar is to share simple changes in your office environment, program processes, and staff interactions with clients to enhance the coaching environment and help promote goal achievement, and to learn one or two strategies to try out in your office. So, I imagine that a few of the things that I'm going to present in this webinar today, you're already doing or maybe you've already thought about. So, just listen along. Think a little bit more about some of the ways in which you can make your

environment a little bit more customer-focused for a coaching environment that will make it easier for them to engage in your services, so that they can continue to achieve their goals.

So first, before I get into the slides, we're going to do a little polling question. Which Tina's going to open up for us. She took over the ball. So, I'd like to ask you all, think about the last time you visited a local government office. And while you were visiting that office, what was your experience in terms of how welcoming the environment was? So while visiting your local government office, you experienced a welcoming environment. Do you strongly agree, agree, feel neutral, disagree, or strongly disagree? We'll just give you 30 seconds to a minute to go ahead and respond to this polling question. Thinking about what it feels like when you're in a typical government office, whether it's a social security administration or the DMV, RMV, if that's what it's called in your state, city hall, the IRS office, if you've ever been to one. Experienced a welcoming environment. To what extent do you agree with that statement?

TINA: I still see some of our attendees still answering, so I'll give them a few more seconds, Ms. Smith. Is that okay?

CAITLIN: Yep, sounds great.

TINA: Okay. Ms. Smith, I closed the poll and the results will pop up here shortly.

CAITLIN: Okay, great. So, thanks, everybody, for responding to the poll. It looks like people, for the most part... we have disagreed. So you did not experience a super welcoming environment. Nobody strongly agreed. One person agreed, three are neutral, six disagree, and one strongly disagreed. So, when you're thinking about whether or not that environment was welcoming, I'll just ask some more questions. You can raise your hand and submit your answers via text if you want. But just what are some of the ways you would characterize your experience when you first walked into that government office? Did it seem cold and sterile? Did you have this icky feeling when you walked in? What are some of the feelings you had as you walked into any of these government agencies that you thought of? And Tina, folks can just type right in, right?

TINA: Yes, or if they would like, they can use the Q and A—not the Q and A box, I'm sorry—the raise your hand option. That way they can probably verbally explain their feelings and their experiences.

CAITLIN: Oh great.

TINA: Either way, it's fine. So at the bottom right, you guys can click on the right hand icon, and that way we can select you and unmute you for you to speak to us. So far, I don't have any hands raised or any questions in the Q and A box.

CAITLIN: All right, well, we'll go ahead and move along. I know that in my personal experience, sometimes I walk into... I walked into the IRS office here in Boston one time. I had to deal with a personal tax issue, and it just felt like a really cold, sterile environment, and it wasn't set up to make me feel empowered to address my tax situation, or I don't often hear people excited about going to the DMV or RMV to deal with their driver's license or what have you because it's not the most welcoming environment. I've also heard from folks that going to the Social Security Administration, sometimes they can actually feel like a criminal walking into that building. It's just so uninviting and so unwelcoming that they feel like they've done something wrong just by walking in the building. So just thinking about these things and how maybe our customers or clients feel when they're coming into our offices to meet with us.

So, in talking about how to make some changes, we're going to focus on first impressions. So, try to use signage that makes the office easier to find and more welcoming. Remove signs that start with “no” or “do not” and contain jargon or abbreviations. Now, jargon and abbreviations can make things more difficult to understand. If people don't know the abbreviations or they don't... they've never heard the specific terms used in that particular office, it can make people feel like, “Oh, I don't even know what this sign really means. So, am I in the right place? Am I doing the right thing?” And it can make people feel less empowered and more nervous about being there. Make the office more inviting by cleaning and repainting. Colors like blue, green, and purple are calming, light colors that create the feeling of space. Check the space each day to eliminate

clutter. So, one of my colleagues here at EMPATH shared with us recently when we were talking about preparing for this webinar, she shared with us that every day at a certain point in the day, she'll walk out of her office and then walk back in intentionally to pay attention to what her desk looks like and what the space looks like for when her participants come in to meet with her. And since then, I've started paying a little bit more attention to the messes on my desk. So, thinking about that. If you have the ability to check your space every day and think about how cluttered it is and, for me, my desk often represents my state of mind. And so, it can be very cluttered sometimes and very messy sometimes, but at other times, if I have my desk more organized, then I actually feel like I can engage in my work directly. And so then when participants come in to meet with me, I'm much more ready and prepared to engage with them. I'm not searching for a piece of paper that I need to use to meet with them. And then our last point on this slide is to rearrange furniture to reduce congestion, right? So, kind of pay attention to where are the chairs and the tables, desks, filing cabinets, things like that. And what's the spacing between the pieces of furniture, making it possible for flow of traffic, right? Or areas in the office where groups of people may congregate to have a chit chat or whatever. Is there furniture blocking avenues in and out of that space? How can you rearrange the furniture so that it's easier to navigate the office?

All right, so the next big section is on conveying high expectations. So, this says at first you can hang motivational artwork that includes diverse people. So motivational artwork can include people doing things. There are images that show what it might look like to get a new job or images of people graduating from school, right? Also, images of people with quotes, motivational quotes. Consider whether a security officer must wear uniforms and if metal detectors are really necessary. So in a lot of government offices, there are security officers and maybe metal detectors, and maybe you don't have control over that. But if you do, if you have the ability to change the situation, consider it. I mean, maybe the security officer could wear more casual clothes and feel a little bit more welcoming to customers and clients as they come in. Landscape paintings are associated with increased positive affect and comfort. So, landscape paintings, they can... they can sort of bring people out of the moment and have this calming effect, this ability to think beyond without really even noticing. You don't want to hang too many of those because then it can get a little cluttered. But just think about that. What kind of artwork do you have up on your walls?

So, create a safe environment. Play soft music; use noise machines; train staff to use lower voices. We use noise machines in our office a lot. And I know when I first introduced the white noise machines to my offices, I thought it was going to sound a little bit harsh or I wasn't sure I was going to like the sound, but pretty quickly you start to... you don't even notice it. It really is just background noise. You hardly notice it and it does create a safer, more confidential environment for customers/clients. And you can turn them off when you don't really need them. You can also play soft music, right? And have your office set up in such a way or your cubicle set up in such a way. Soft music isn't that disturbing to folks around you, if you keep it at a pretty low volume and it's nice music. Training staff to use lower voices, especially when they're engaging each other around open spaces or around... if you meet with customers or clients in cubicles, it can get hard to have confidential conversations unless you use softer voices. Using a soft voice is also... it's an easier way to cut through some of the crisis. So when customers come in a little bit amped up, if staff are ready and trained in using softer, calming voices then it's easier for customers to calm down quicker. Arrange the waiting room seating so that visitors are facing out and not directly across from one another, because when they're facing directly across from one another, it just creates more opportunity to think about, "Oh, what am I doing here? What is she doing here? What is he doing here? Why is he looking at me?" Set up the waiting room so that people can really just be focused on waiting for their opportunity to meet with their coach. Softer lighting can reduce stress. So, oftentimes in buildings, the overhead lights are really bright and we don't have a lot of control over them. Often they're fluorescent. Fluorescent lighting can actually create stress or increase somebody's stress level. So if you have the ability to bring in some lamps, shades, turn off the overhead lights, and make a space with softer lighting, it can be much more welcoming, much more relaxing. Plants promote peace, tranquility, and enhance self-esteem. So if you have space to put in just some succulents or in the corner can be a small tree in a pot. Ficus are really easy. They don't take a lot of care. You can water a ficus a couple times a week and it should be good to go. So, it's pretty easy to bring plants into an office and that really adds to the environment. It's not

like bringing a plant into an office is going to all of a sudden change the way you interact with your customers, but that plant creates a slightly more encouraging, inviting environment.

So, back to the focusing on the customer. Train front counter staff in customer service. So, greeting each client with a friendly "Hello, how can I help you?" And I imagine that a lot of front counter staff are trained in that or do know to treat people with courtesy and respect, and sometimes, we get busy, right? So this kind of maintaining this really good customer service and high expectations and a welcoming environment, it's not a one-time fix. It's something that we need to be looking at every day and talking about as teams all the time. How can we make this space more inviting? Or what might we have done differently this morning that could've made it more inviting? It's not meant to call anybody out and say, "You're not providing good customer service." Just finding ways to make the customer service more inviting. Some offices have considered adding drop boxes and special lines for quick transactions, so that folks don't have to wait around just to drop off a form. Right? That can make the environment more accessible. Some clients respond better if seated corner to corner rather than across from staff. So, oftentimes in offices, you know in the movies, any time somebody meets with a lawyer, you see the lawyer behind the big desk and then the person meeting with the lawyer is on the other side of the desk, and it's a very transactional relationship. So in this environment, we're encouraging that maybe you put the chair on the corner of the desk or on the side, not across the desk, but on the side, so now you're corner to corner from each other and you can pass papers a little bit easier, and there's not such a transactional relationship across the desk.

So, I'd like to open it up for discussion. Did any of these ideas that I just presented or any of that raise thoughts in your mind about the question I asked earlier on what your experience has been in government offices and maybe things you could think about changing in your space? Looks like the Q and A is highlighted, so maybe we've had a question. Oh, Mass [Massachusetts] DMV is a very controlling and dehumanizing experience. I'd agree with that. Feel free to click that little gray hand if you want to speak over the speakers and join in conversation that way.

I have a question that came in. So, what can we do if we don't have a large budget or space? Well, that's a really good question. So there are some simple things that you can do. Well, the first is one of the things I mentioned earlier. Creating a really clean space, right? So keeping your desk free from clutter, paying attention to how the space looks as people enter it, right? And moving the furniture around. That you can do for free. Thinking about how you can realign the chairs and the desks and things. And there are ways of getting a hold of some motivational artwork pretty inexpensive. Really, Family Dollar sometimes has some motivational artwork for sale, and thrift stores do sometimes. Does anybody else have ideas on what you can do to increase the accessibility of the space?

TINA: Ms. Smith, we have a question from Sam. Sam, are you there? I think Sam has his ear headset on, so we're probably not going to be able to hear from him. Let's see. I think he typed in a question. Okay, he did. Do any of the sites have examples of things they have done that worked well with their space? I guess he was wanting suggestions.

CAITLIN: Yeah so, while people are thinking about that and maybe considering responding, I can tell you about my work. So I work... my team works out of a trailer, a construction trailer. On site, we're working in a choice neighborhood project, so we're working with 200 families, but we work out of a construction trailer and you might think that a construction trailer wouldn't be so welcoming. So we've done a lot of work to, if you walk in the door, the space is very open. There's a couple of big tables in the middle of the room and we have a little area with a kid's table and some toys. We have an area set up with a Keurig machine and some cheap coffees and a water cooler. So, as people come in we always offer them a glass of water or a cup of coffee. And kids have free reign with the toys in the corner. And so, the space is just immediately welcoming, and then it's just the way that we interact with the clients, the customers, as they walk in the door. We immediately welcome them into the trailer and invite them to meet with somebody. And if their coach isn't available in that particular moment, we make sure that they're comfortable and tell them we'll let them know. We've just created a really welcoming space. I'll read an answer here from Wendy. She says that district offices have several rules which limit creativity in the work environment. Good to think outside the box, though. Yeah, so that's a good point. But

there are ways to think outside the box to make the space more welcoming. I have another question to share with everybody. How can you make a customer feel comfortable when there is a long wait? So, good question. So, you can provide reading materials. Like I said before, one of the points was about creating separate lines or drop boxes. So sometimes customers don't really need to be there very long or for... they just need to be there for one particular transaction. So if that can happen more quickly without having to wait a long time, then that's better. If there's a long wait and there isn't a way to shorten that wait, then reading materials can be helpful. The soft music in the waiting room and the softer lighting can make it a little bit more inviting. And again, that signage. If the room is filled with signs that start with "no" or have "do not" all over them, it feels a little bit more aggressive. So if there's signage up that's a little bit less aggressive, it can make the environment more inviting, more welcoming.

TINA: Ms. Smith, we have something from Ms. Martha Bentley. She said, "For years I cut pictures out of magazines from motivational or a calming artwork" for her office. She said frames can be purchased at the dollar store. So if you're on a budget, you can get your frames from the dollar store.

CAITLIN: That's a great idea. Magazines are full of motivational images and statements. Another suggestion from a site is that some clients can't find your office. It's stressful if you can't find the office. So, making sure that the signage in the waiting room is really clearly pointing toward the offices so that folks know how to get to you. We have here from Wendy, "Also, provide interesting resources on the table and walls about family stuff." Yeah, I think pictures of families and information about how families can access resources are definitely ways of making the environment more welcoming.

TINA: Okay, Caitlin, I have a question. What are your suggestions when you can't avoid metal detectors or security when you visit these government agencies?

CAITLIN: Oh yeah. That's a good question, right? So, one thing you can probably do is to let customers or clients know ahead of time that there will be a security guard and a metal detector as they enter the building and tell them it's not meant to make them feel uncomfortable, that it's actually just to protect everybody in the environment or something like that. So just give them a heads up so that folks don't show up and feel hit by the metal detector, right? And require the security guards to get training in customer service and being a little bit more friendly. I mean, I've definitely noticed a difference between security guards who are more friendly and welcoming and the ones who are not. Sometimes in courthouses, they're not so welcoming. But the experience of going through the metal detector and putting all your stuff on the tray and everything is a lot less intimidating if the security guards themselves are trained in customer service. So, that can be helpful.

Well, Tina, I'm thinking that if other folks... if nobody has anything else to add, I think we can go ahead and wrap it up. Oh, we want to show the tip sheet. And Ruthie has an announcement. Let's show the tip sheet.

TINA: Yes, for all the attendees, we do have a tip sheet that you guys can download. Ms. Caitlin, I'm going to go ahead and get control of the—there we go. As you can see on the screen is the tip sheet that we will have available for the attendees to download. Ms. Caitlin, would you mind if I go ahead and have that available for them to download now, or did you want to have...

CAITLIN: No, absolutely make it available. I just want to walk y'all through it real quick. This tip sheet is just meant to help you remember some of the things we talked about today. You can have it up in your offices or talk about it in team meetings or with supervisors or with staff and think about ways that you can make your offices a little bit more inviting. Each section of this tip sheet is just basically what was on the slides before in this presentation with the same images to help you remember everything we've talked about. And just take this as an opportunity to think about small changes. One or two changes you could make to help make the environment more welcoming so that you can boost customer success in coaching. And Ruthie's going to have an announcement to make. Tina, is it okay if she makes that announcement now?

TINA: Yeah, she can make the announcement, and I will go ahead and transfer the slides for the participants. All you have to do is just hover over the document and right-click to download it, okay?

RUTHIE: Great. Well, thank you, Caitlin, so much for sharing that presentation with us. And I just wanted to share with the states that next week we will be going out to Missouri and doing a half-day training on the same topic that involves some great activities. So, if you are continuing with the IIEESS project in year two and you are interested in this training, we can talk to you about sending a team out to do that training for your staff, and you could even consider including your security staff, your maintenance staff, everybody who is there in your office, to talk about how to create a calm and coaching environment and doing whatever we can to boost the success of your clients. So, keep that in mind. And a second announcement I want to make is that we will be having another affinity webinar. The topic will be Set, Measure, Report. I think it's called Set, Measure, Report: Using Data to Improve Client Success. It's going to be held on September 21st at 2 P.M. Eastern Time. So, the same time but on a Friday. And the presenter is going to be Ashley Winning, who is the Vice President for Research and Evaluation at EMPATH. She's done some work with New Hampshire already on outcomes, measurement, and evaluation. And I would like to encourage you to participate in that affinity webinar later on, and start thinking now about what questions you might have about how do you measure your coaching success in your town or organization. Thank you.

CAITLIN: Great, thank you.

TINA: And again, thank you ladies for your presentation. If you don't have any further questions in the webinar, you guys have a good day. If so, please address them now while we're here. Okay, if you don't have any questions, I would like to thank you again, and you guys have a great day.

CAITLIN: Take care. Thank you, Tina.

TINA: No, thank you.

CAITLIN: All set.