ADVANCED USES FOR TELEPHONE TECHNOLOGY FOR HOTLINE PROGRAMS

How To Better Serve the Needs of Clients and Staff

Mrs. Janes has called you as Managing Attorney to complain that she had to wait over an hour to speak to a Housing Advocate. It is now 3:45 and the phone lines shut down at 4:00. You have 18 advocates in your office and 6 are assigned to the Housing Unit. How do you, as manager, analyze the validity of Mrs. Janes' complaint?. Is the client exaggerating her wait time? Why aren't you hearing complaints from clients from other substantive areas?

You ask a seemingly idle advocate to take one of the calls and she angrily replies that she has already taken fifteen calls today, but the advocate in the next office has been talking to her friends on the phone all day. How can you tell if your advocate has really taken the fifteen calls? How do you assess the validity of the complaint about the co-worker?

Analyzing Call Data - Substantive Calls

The obvious data that can be retrieved from a telephone system is the number of calls waiting. The fact that six housing calls are waiting can be a frustrating piece of information if, given your funding levels, you do not have the resources to add staff. However, if you effectively use the information available from your phone system, it can provide a wealth of data which impacts on 1) delivery of client service, 2) quality of staff performance, and 3) interactions with legal services programs in your network and with the pro bono sector.

Using Your Phone System to Analyze Delivery of Client Service

Returning to the example of the frustrated Housing client (and the frustrated Managing Attorney!), the issue that your phone system can help you explore is not necessarily that there are Housing callers waiting but why there are Housing calls waiting. By reviewing data from your phone system, you can begin to examine the particulars of how your delivery system is operating and how it can be improved.

The phone system that is artfully utilized can answer a series of questions which are directly linked to delivery of service. Again, using the Housing example we can look for answers to a variety of questions from the obvious to the esoteric. A sample of questions could be:

1) How many housing calls are waiting?

2) How long has the call been in the system?

3) Has the caller spoken with anyone in the system (intake worker operator, etc?)

4) After an initial intake, how long does the average Housing caller wait?

5) How many advocates are assigned to the Housing Unit?

6) What is the average wait time for a Housing call?

7) What is the average number of Housing calls that come into the system on a daily basis?

8) Once a Housing call has gotten to an advocate, how long does the average call take?

9) What percentage of the total calls into the system are Housing calls?

10) What is the average wait time of Housing callers at 10:00 a.m.?

11) What is the average wait time of Housing callers at 3:45 p.m.?

12) What is the average wait time in all of the substantive units?

13) What is the average amount of time to answer substantive calls over all the Units?

Collecting this data is going to provide very important information for your program. Some of the data will be obvious - for example, if your data shows that 60% of your calls are Housing and you have only assigned 33% of your staff, then you may want to think about how your staff is allocated. However, before you rearrange your entire office, you may also want to look at data regarding how long it takes for an advocate to speak to the average Housing caller. If the average Housing call lasts about twenty-two minutes and the average Benefits call lasts approximately forty-five minutes, then you may want to consider this piece of information as you review your staffing issues. Similarly, if you have flexibility in your staffing issues, you may want to look at data regarding the time that the Housing calls are coming into your system. If a review of data over time shows that, of the total number of Housing calls that come into your system, 20% come between the hours of 9:00 a.m. and 2:00 p.m. and 80% come after 2:00 p.m., then obviously this is something you want to consider as you make staffing assignments. Taken a step beyond that, you may want to examine how many calls come into your system in total between the hours of 9:00 a.m. and 10:00 a.m. If it is only 5%, then you may want to decide to look at how the office day is structured and perhaps change the office daily schedule, such as having office meetings or trainings during those early morning hours.

Assessing Staff Performance

In our initial Housing example, we have a scenario where not only are clients waiting but a staff person is complaining about being overworked while her peer is "slacking off." Clearly, if one were to make an on the spot decision about staff effort it would be subjective at best. Using the phone system, there is a range of data that can be extracted which can give you valuable information - from the obvious such as how many cases Norman has taken verses how many cases Sara has taken, to the more complex such as why does Nancy take an average of forty-five minutes to talk to a bankruptcy caller while it takes Don twenty minutes. As a starting point, we are going to extract information about an advocate who is doing among other areas, Housing law. For sake of example, this advocate also takes calls from the Benefits Unit.

1) How many calls does the employee take in a day?

2) What is the average number of calls that the other advocates take?

3) What is the average amount of time that this advocate takes on a Housing call?

4) What is the average amount of time that all other employees take on a Housing call?

5) What is the average amount of time that the employee took on calls in the Benefits Unit?

6) What is the average amount of time that all employees take on Benefits calls?

7) How much time did this employee spend entered into the phone system today?

8) How much of that time was spent on client calls?

9) How much of that time did the employee make himself unavailable?

10) How much of that time was the employee spending on making phone calls initiated by the employee?

The list obviously is on dependent on your individual office and employee. The point is that this data is invaluable to be able to assess exactly how an employee is functioning and how it effects client service and the operation of the office. If, in fact, you have collected data about an employee that raises concerns, it is probably time to do an evaluation. Clearly, evaluating staff can be a daunting task, however, the statistics that you have obtained from the phone system gives you an array of information about your employees' work habits. This hard data may not address all of the employees' issues, however, starting a difficult evaluation with hard numbers gives you "neutral" base to, at the very least, begin your critique. Similarly, data that you obtain may provide some very positive feedback about an employee which should certainly be used to praise work effort.

<u>Interactions with Other Legal Services Programs and the Pro Bono Sector</u>

Communicating with your sister legal services programs is key for any Hotline program. Frustrations may be articulated about numbers and types of cases taken, as well as the feedback from clients who are referred to the Hotline but who only get busy signals. There is a variety of data that you can get from your phone system that will aid your communication with your legal services network. For example:

1) How many calls come into your system per week?

2) What time of day is the volume of calls the highest?

3) What day of the week is the volume highest?

4) What is the substantive area for which your system receives the most calls?

5) What is the percentage volume of calls per substantive area?

Again, the information that you need to review depends on the specifics of your program's issues. However, a sharing of this type of data will be very useful to show those within your network the construct of your client flow and may very well impact on their perception of your program. For example, if you can share data with them showing that your highest volume of callers is between 11:00 a.m. and 3:00 p.m., but your Hotline hours are 9:00 a.m. to 7:00 p.m., this may impact what time of day that they suggest that callers try to reach you.

Similarly, using the data from your Hotline is a useful vehicle in communicating with the Pro Bono Bar. Even though the Legal Services community may be jaded to the staggering numbers of eligible clients who need our assistance, I have found that the private bar is always impacted when we tell them that last year Statewide Legal Services spoke with over 13,000 clients. Further, as you look to your Pro Bono bar to take cases, you can use the data from your Hotline to examine in what areas you need to recruit Pro Bono lawyers. For example, if your data shows 35% of your family calls need to be referred to your Pro Bono Unit, but only 10% of your Pro Bono attorneys will accept family cases, then it is clear that your task is to look for ways to either recruit more family attorneys or perhaps to put programs in place to train Pro Bono attorneys in Family Law.

Conclusion

Using data from your phone system won't magically solve all of the issues and challenges facing your program. It will, however, give you some empherical data from which you can begin to analyze your program's activity. This data, at the very least, is a starting point in your attempt to positively impact client service, staff productivity and program goals.

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