

BUDGET PLANNING AND ACCOUNTING CUSTOMER SERVICE MISSION

Spring 2020 | Lauren Morris

Background & Our Design Challenge

WHAT IT TOOK:

From the BPA design team:

4 participants- 4 central office staff from the BPA team

12 dedicated hours per person over 5 working sessions

From ROCKit:

1 Innovation Strategist to plan, facilitate, and guide the team through the process

40 hours over 6 months

After attending summer ROCKit Launcher: Intro to Design Thinking Workshop in summer 2019, a team from the MMSD Budget Planning and Accounting (BPA) department decided to utilize their learnings and launched a design mission focusing on improving their customer experience, specifically targeting school and department administrative assistants. A four person design team made up of a clerk, specialist, manager, and analyst from BPA set out to learn more about the strengths and potential pain points of their current department school support model around budgets, finance and accounting. The design team wanted to gain empathy and better understand the journey of the clerical and accounting staff of the schools and departments they support. They would then use this information to determine where to improve and ideate ways to do that.

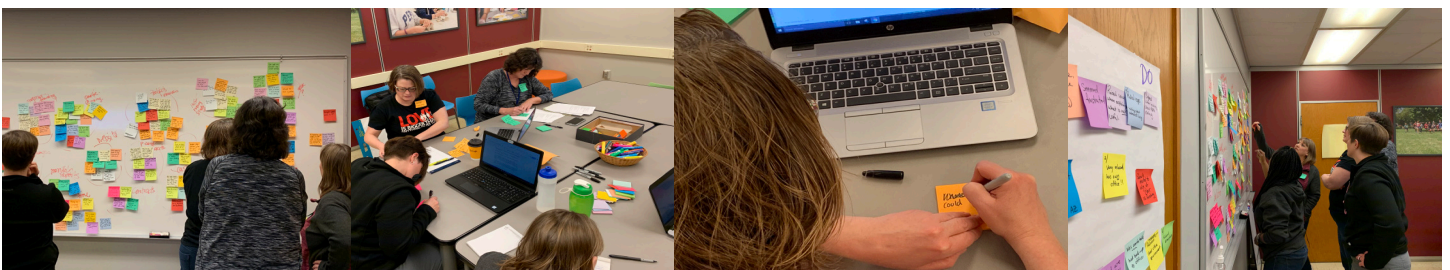
The Design Challenge:

Redesign the BPA customer service experience for staff members in charge of budgets, finance, and accounting within MMSD schools and departments while considering budget, planning and accounting staff members in a world where education is constantly changing and not every student has equal access and opportunity and that schools/departments have varying budgeting needs and expectations.

Empathy Inspiration to Insight Generation

After engaging in the ROCKit innovation workshop, the BPA team set out to engage in a larger design mission. The mighty team of four BPA staffers planned the design project, set working dates, created interview scripts and then conducted empathy interviews with 22 different clerical staff from 12 different schools (4K early child care sites through high school) and 9 different offices around the district. They also interviewed a principal.

With the support of ROCKit, the BPA design team then came together to analyze their empathy data by finding key insights and themes in order to clearly define their problem and find possible areas of opportunity. Some of the major themes of the empathy interviews were complements to the BPA staff (e.g., hardworking, useful meetings); the overshadowing of less frequent accounting work by daily office management; the difficulty of using the BPA website; and need for changes in communication (e.g., more frequent, simpler language).



BPA Client Persona Canvas

Hi!

I am...
an MMSSD secretary,
responsible for maintaining
financial records and systems

Negative Trends

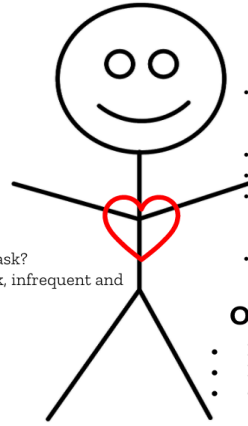
- Unsure of who's responsible for what/ who to ask?
- Budgeting a smaller portion of day to day work, infrequent and often overshadowed by more immediate tasks

Headaches

- MMSSD and BPA websites hard to navigate
- Access to training
- Amount of training
- Access to updated information

Fears

- Doing something wrong
- Being reprimanded when asking questions
- Getting hand slapped or disciplined for errors

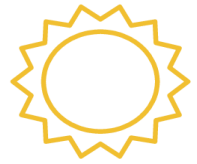


Needs/Wants/Desires

- Trust--they make mistakes and aren't trying to get away with something
- Understanding
- Less "accounting speak"
- Understand they are often the "middle person" between boss and BPA
- More consistent support

Opportunities

- Know resources exist
- Rapport
- quarterly secretary meetings



Positive Trends

- Often staff nice, patient
- Everyone works hard
- BPA at secretary meetings
- Bulletins
- Some procedures are clear cut (ex. p-card use)
- They have at least 1 person in office to readily talk to

Hopes

- Resources with less "accounting speak"
- Continued BPA presence at secretary meetings
- Tips and tricks (frequent)
- Quick access to who to contact in BPA and for what

ROCKIT

Ideation

Using these themes and insights from the empathy interviews, the design team created a solution concept to use as a guide for their iteration sessions:

We will design an improved website that is personable, navigable, clear and concise so that MMSSD school personnel can find the people and information they need in order to feel successful.

From here the Design team then came up with three How Might We... statements to further guide their solution brainstorming:

- 1. How might we communicate and share secretary training information to school secretaries and central office secretaries (personally and physically) about BPA processes, procedures, and practices?*
- 2. How might we offer space and tools for people to get questions answered in a timely manner?*
- 3. How might we improve access to staff members and existing tools in order to ensure people know who to call for what reason, make language more user-friendly to non-accountants, ensure people are updated when things change, and/or ensure they have access to information on how to carry out processes?*

The goal was then to use these How Might We... statements in a full BPA department e-storming activity (online brainstorm) in order to gather each staff member's solutions ideas remotely. However, the design team realized through the iteration process that they needed to spend more time up front working with their BPA teammates to explain the design process and purpose; to accomplish that, they decided to cycle back through some of the design steps to improve wider team buy-in of potential solutions.

Outcome

Although the momentum of this work slowed due to COVID-19, the BPA design team is continuing to use Liberatory Design to improve the customer service experience of the clerical staff around the district. This school year the team will start prototyping a new website in order to improve usability and ease of access, provide more readily available resources, and better insight into office structures and positions.



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