

Case Study: Creating a Resident Technology Support Service



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Categories:

- ◆ Technical Support
- ◆ Education and Training
- ◆ Resident Engagement and Satisfaction

About the Organization

Organization Name: HumanGood

Main Contributor:

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Organization Type: Life Plan Communities (LPCs)

Organization Description:

HumanGood was founded on the belief that everyone should have the opportunity to live life with enthusiasm, confidence, and security, regardless of physical, social, or economic circumstances. Our mission is to ensure that those we serve have every opportunity to become their best selves as they define it. This extends to those who live in our communities, their families, friends, and those who serve them. With approximately 5,000 team members serving more than 13,000 residents in our 21 life plan communities and 95 affordable housing communities in California, Washington state, Arizona, Nevada, Idaho, Pennsylvania, and Delaware, HumanGood is the sixth-largest nonprofit senior living provider in the country.

Project Description

HumanGood's Resident Technology Support Service was developed out of the visible need to provide residents with technology support and services for their personal and home devices. In pursuit of our winning aspiration of being a leading innovator in delivering enriched and engaged experiences, the program was created in 2 parts. The first is a support system for assistance with and repair of existing and future resident technologies. The second is an education program to enhance our residents' understanding, familiarity, and experience with a multitude of technologies used in everyday life.

Business Model

Personal technology support service is billed at \$60 per hour in 15-minute increments, and charged separately through the existing financial systems. Charging is up to the discretion of the IT administrator providing support, depending on the effort required. Some communities have chosen to pay for the resident's service out of an operational budget line rather than having IT charge the resident directly.

Implementation Approach

For years, the HumanGood IT department supported over 3,500 team members daily. To accomplish that, we had 18 IT administrators working locally in our life plan communities. Each was responsible for 1-2 life plan communities or community support centers, along with an average of 5 affordable housing communities. While we worked hard to provide the best customer service and support to our team members, we knew we needed to do more for our residents.

The development of the Resident Technology Support Service (RTSS) started in earnest after the 2018 resident satisfaction survey showed that IT support rated lowest among all services provided to our residents. We evaluated the many ways to provide support, including outsourcing to Best Buy's Geek Squad, hiring more onsite team members, and involving volunteers and students. In the end, none of these matched our goals due to expense, availability, or liability. As a result, we decided to use our own local IT administrators as they were familiar with the residents, work around them daily, and have existing, trusting relationships.

This concept created a challenge: how to free up time from the work local IT administrators normally did supporting team members. At that time our community IT support team handled 700-900 tickets per month. An offshore helpdesk service was contracted at the same time as a RemedyForce IT Service Management (ITSM) system

was built to replace the aging Track-It! ticketing system to take away some of the basic, remotely performed support workload and leave mostly hands-on tasks to be performed in-house. This group, referred to as the CSD, Client Service Desk, or IT Helpdesk, and affectionately known as our HumanGood-India team, reduced our local teams' workload by nearly 50%.

To design the resident support service, we evaluated what our local technicians were doing for team members and how their experience would match up to the expected resident need. We highlighted enterprise-based tasks and those with legal ramifications and liabilities, which gave us a list of items we felt were out of scope. This included anything that related to health and financial data, personal passwords, work that risked loss or damage of resident data, home theater equipment, personal cable or landline phone support, vendor relationship assistance, home automation, medical or assistive devices, any system or OS that the techs didn't feel comfortable with, and cable TV, which is supported by Buildings and Grounds. We were left with a healthy collection of work that we considered in-scope. These included support for home networks, PC's and peripherals, mobile devices, streaming devices, connectivity to HumanGood networks, software installation, and HumanGood-provided phones.

Our first iteration, RTSS 1.0, began with 2 areas of focus: reactive and proactive work. Reactive work included all requests for technology support. We provided this during dedicated 3-hour periods each week on an appointment-only basis. To allow for data capture and billing, we chose to expand the WorxHub Maintenance Platform as these tickets are only done by local techs and not shared among the team like those entered in RemedyForce. Additionally, we created a technology workshop that was held once a month. This workshop was to be an open 4-hour block of time held in a public area, where our administrator answered questions and provided technology support and solutions without charge. After we put the program into practice, the workshop quickly developed into a hosted group technology discussion for ideas, devices, and software, and a place where residents helped fix problems for each other. Proactive work took the form of classes held once a month. The class topics were chosen from those that we saw the most support requests for in the first few months of the program. We chose to present the same content at all communities each month to help lessen the added workload on our Northern Region IT Manager, Lillian Quackenbush, who developed all of the classes for the first year of the program.

The design was accepted and supported by company leadership and we started rolling out the new design to our IT team. To help our team get familiar with home technologies,

internet of things (IoT) devices, and voice assistants, we purchased a few items for them. Each IT administrator received a package including an Amazon Echo Dot, an Amazon Fire Stick 4k, a Roku Premier 4k, and a Google Home Mini. This minor financial investment went a long way toward building their comfort with the plan and their confidence to help the residents with similar devices.

We began the pilot program in February 2019 at 2 communities, the Terraces of Los Gatos and White Sands La Jolla. We broadcasted the new offering through our digital signage, executive director weekly resident meetings, and postings around campus. To kick off the program, we held meetings with the residents to discuss the service, the scope, and how to request support. Prior to starting at each site, we developed a survey with SurveyMonkey, delivered to the residents on the IT administrator's iPhone immediately after the support was provided. The results showed that residents overwhelmingly liked the service they were provided; over 84% of residents rated the service as excellent and a whopping 97.5% said they would use the service again.

Since the pilot was so successful, we briefed the operations team and company leadership to gain approval to expand the service. Using a rolling timeline that included hiring 2 replacement IT administrators, we expanded to all 18 communities over a 4-month window. During this period, we taught 6 classes starting with how to use WorxHub, so they could better use the service. This was followed by phishing awareness, Wi-Fi and other wireless systems, Amazon Alexa devices and services, and streaming devices. Our team also played a pivotal role in teaching mobile device use and coupled that with presentations on and assistance with using devices to complete the first all-digital resident survey.

After 6 months, we evaluated the work and found that what started as a modest 28 tickets in the first month of the pilot totaled nearly 1,600 at the end of the first 6 months of full implementation. Results from the resident survey showed that resident satisfaction with IT technology support had increased from the previous year. At this point we also took the time to listen to the residents to find out what opportunities existed to improve the program. The results were surprising, as there were only 2 major areas they wanted us to change. The first was a desire to have more flexibility in appointment days and times, and the second was an interest in providing more input on class subjects.

We used these suggestions to develop our improved program, RTSS 2.0. The first change was to open up our IT administrators' calendars to give them the flexibility to schedule team and resident appointments any time they had openings during the work week, barring any major outages

or team member work stoppages. Next, we branded our education program “TechED by HumanGood.” We surveyed our residents for ideas and concepts they wanted to learn about in the class sessions and gathered the top 18 ideas. These would be fully developed, and each community would not only choose 8 of them for May through December of 2020, but help decide in which order they would be presented.

To help us get TechED by HumanGood off the ground and do a better job as teachers, we engaged professional educator and coach Eva Dunlap of Digital Citizen to develop the materials and provide advanced training to our entire IT department on presenting to and teaching residents. As stated by Eva, “These classes will be delivered to each community by its IT administrator. Each administrator will have completed a DigitalCitizen training program designed to illuminate and overcome the physical and cognitive challenges of working with technology as a senior. In addition, this program focuses on the administrator’s ability to gain trust, understand the student, effectively communicate the topic, and encourage adoption. Access to proper instruction is only part of the solution. The continued connection is completed by the community administrators. The presentations will create opportunities for residents to connect and to build rapport and confidence in the abilities of their community management. From there, any future issues that arise can be monitored and managed by the community’s online ticketing system.”

RTSS 2.0 was scheduled to start in April 2020. This was postponed due to the COVID-19 pandemic, but we didn’t stop providing support to our residents. While we did discontinue the social activities of classes and workshops, we increased our one-on-one support with residents. We adopted procedures involving masks, gloves, hand sanitizer, and appropriate social distancing while we visited residents in their apartments providing technology support and some form of companionship during this isolating time. The most requested type of support, hardware repairs, quickly gave way to software and app installation requests. We assisted in hundreds of downloads of Zoom and telemedicine apps, along with coaching on the use of video conferencing to visit with family, friends, and health care providers.

When we return to group activities, we’ll move ahead with RTSS 2.0. Until then, we will keep working hard to provide the best service to our team and residents. After deciding that providing resident technology support was mandatory for HumanGood, we are proud that in the first year of service, we have completed over 4,000 tickets for residents while fulfilling 7,400 tickets for team members.

Outcomes

- ◆ Resident satisfaction increased by an average of 3% after only 3 months at the time the 2019 resident survey was done, and over 17% for the 2 pilot communities who had the service for a full 6 months.
- ◆ 4,085 resident work orders were satisfactorily completed.

Challenges and Pitfalls to Avoid

- ◆ Don’t assume that resident support will pay for itself or be an income stream.
- ◆ Providing some services and not others leads to confusion and confrontation and your team will have to answer hard questions.
- ◆ Providing service in only some levels of living will exclude some who need it the most.
- ◆ IT administrators who are good at fixing things don’t necessarily have public speaking and teaching skills, and hence cannot deliver exceptional resident education.
- ◆ Asking the residents what they want and need is a must, though this can lead to assumptions and unrealistic expectations, unless you follow up with a clear list of what your community can and cannot do!

Lessons Learned/Advice to Share with Others

- ◆ Get executive buy-in from the get-go, and develop the program as part of a company initiative.
- ◆ If developed as a paid service, billing and finance coordination must be agreed upon early, and a method for collection must be developed before the first request is completed.
- ◆ Clearly outline and publish what is in and out of scope, and have alignment with leadership around the expectations.
- ◆ Identify and provide contacts to residents for alternative sources of support if the local team can’t or won’t handle a problem or need.
- ◆ Teaching is a must. Don’t rely only on support to fix problems, as education will eliminate some types of common and recurring issues before they arise.
- ◆ Work within the experience of the team or be ready to get them training to raise their level of knowledge.
- ◆ Bring in help to augment and educate your team, as this program is an investment in your team, company, and residents.
- ◆ Think about how to support residents in a coronavirus-like situation with policies, procedures, personal protective equipment (PPE), and social distancing.