



# Customer Group Redesign & Feedback Webinar

TRAINING • CONNECTING • DEVELOPING ILLINOIS' WORKFORCE



Presenter:  
Natasha Telger

## Welcome!

The webinar will begin at 1:00PM.

### Webinar Audio Options:

Option 1: Computer Speakers (Recommended).

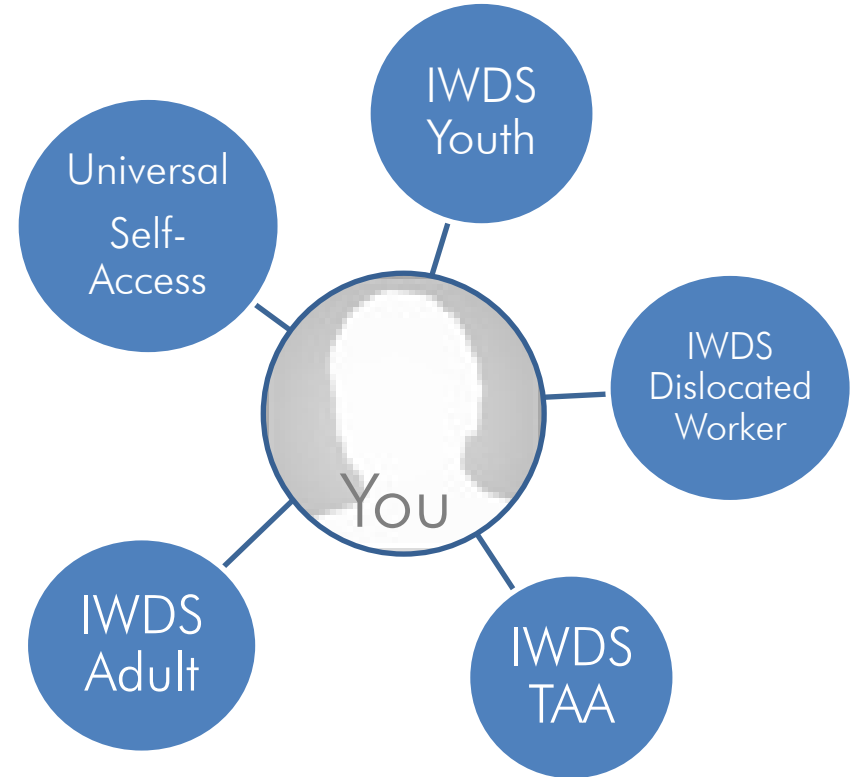
Option 2: Phone. Call into the conference call 1-866-803-3878 and mute your computer speakers. There is no pin needed to participate on this call.

Please answer the polling questions below while you wait for the webinar to begin.

# Illinois workNet® Customer Group Redesign

## Agenda

- Background
- Review and collect feedback on customer groups redesign proposals for use with:
  - Universal self-access customers
  - IWDS customers
- Next steps



# Illinois workNet® Customer Group Redesign

## Background Information

### What is the purpose of a customer group?

- To provide an interface that allows workforce professionals to provide assistance and guidance to customers through the use of technology.

Customer groups allow workforce professionals to:

- View customer career interest survey results;
- View customer work readiness activity responses;
- View customer assessment results; and
- Communicate with the customer.

### Who is in a customer group?

- Customers who have an Illinois workNet individuals account can be added to a group.

### Who can currently set up a customer group?

- Local Illinois workNet Coordinators.
- Workforce professionals who have been given access by state level staff.

**Note:** Once workforce professionals are given access to a group, they can add/remove customers in the group.



# Illinois workNet® Customer Group Redesign Background Information

## Customer Group Features

- 1- Workforce professionals search for and add Illinois workNet individuals account holders to the group.
- 2- Customer password recovery information is available to help a customer who has forgotten their information.
- 3- If the customer is in IWDS, the Illinois workNet account is “linked” to their IWDS account if their SSN is in their Illinois workNet account.
- 4- Customer career interest surveys can be viewed if the customer has completed and saved them in their Illinois workNet account.

The screenshot shows a web interface for adding a new workforce professional group. At the top, there is a search bar for 'Group Name' with a dropdown arrow. Below this is a yellow bar with 'Edit' and 'Delete' buttons. The main section is titled 'Customers' and contains a table with columns: 'Name/User Name/Birth date/Secret Answer', 'Contact Information /Date added to group /Work Site Evaluation', 'Link to IWDS status/type', 'View Interest Results', and 'Customer Summary (filter by Member type)'. The table has two rows of customer data. Numbered callouts are placed over the interface: 1 points to the 'Add New Customer' link; 2 points to the birth date field in the first row; 3 points to the 'Link to IWDS status/type' column; 4 points to the 'View Interest Results' column; 5 points to the 'Customer Summary' column; 6 points to the 'Customer E-mails' link; and 7 points to the 'New Customers Quiz Stats' link.

	Name/User Name/Birth date/Secret Answer	Contact Information /Date added to group /Work Site Evaluation	Link to IWDS status/type	View Interest Results	Customer Summary (filter by Member type)
<a href="#">Remove</a>	10, NTnewuser NTnewuser10, 1990 167374	2450 Foundation Dr Springfield IL 62703 temphelp@illinoisworknet.com no phone nbr Added: 2010-11-17 14:02	Enrolled	Interest surveys not started	Type: New <a href="#">Customer Summary Page</a>
<a href="#">Remove</a>	workNet, Pat Demonstration, May 24, 1974	2450 Foundation Drive Dolton IL 62959	Enrolled	<a href="#">View Interests</a>	Type: New <a href="#">Customer Summary Page</a>

- 5- Work readiness activity saved responses can be viewed through the customer summary page. Assessment results are available for the current and previous programs as well.
- 6- Customer email tool can be used to communicate with customers in the group. Standard or customized messages can be sent to the customers Illinois workNet account and/or their email account.
- 7- Export tools to export the customer list or view/export assessment results.

# Illinois workNet® Customer Group Redesign Background Information

How can you use customer groups with your customers?

## Best Practice Examples From The Field:

### Universal Self- Access Customers

New resource room customers (walk-in or orientation/workshop participants) are directed to set-up their Illinois workNet accounts and complete the Illinois workNet My Activities that include career interest surveys. They can set up an appointment to talk to a career counselor but they need to complete the activities prior to the visit. The career counselor can pull up the customer information, review the work that has been completed, and discuss next steps.



### IWDS Customers

IWDS customers are directed to complete the activities/career interest surveys within their Illinois workNet account. The career counselor can pull up the customer information, monitor their progress, and provide guidance. Use the email tool to send customers customized messages on upcoming events, deadlines, and reminders.

# Illinois workNet® Customer Group Redesign

## Background Information

### Provide Guidance and View Responses Using My Activities:

- An optional pre-assessment.
- Eleven activities that allow the individual to save their responses within their account.
- Post-assessment with unlimited attempts.
- Certificate of completion saved with the customer's account once the individual scores 70% or higher on the post-assessment.
- Activities and assessments are translated online in multiple languages.

**My Activities**

[My Activities Instructions and Information](#)

**Pre-Assessment**

**Check** Not Complete **Optional: Do you want to see what you know before you start the activities?**  
[Click here to take the Pre-Assessment Quiz.](#)

**Prepare & Learn**

**Activity** [Set Up Your Email and Update Your Illinois workNet Account](#)  
Complete

**Activity** [Identify Your Skills](#)  
Not Complete

**Activity** [Introduction to Job Search Preparation & Resume Writing Activity](#)  
Not Complete

**Activity** [Introduction to Exploring Careers and Training Activity](#)  
Not Complete

**Activity** [Find Training Programs](#)  
Complete

**Activity** [Introduction to Interviewing for a Job Activity](#)  
Not Complete

**Find a Job**

**Activity** [Introduction to Workplace Skills Activity](#)  
Not Complete

**Activity** [Introduction to Job Searching and Applying for a Job Activity](#)  
Not Complete

**Activity** [Use Networking](#)  
Not Complete

**Achieve Your Goals**

**Activity** [Set Your Goals and Make a Plan](#)  
Not Complete

**Activity** [Manage Your Money](#)  
Not Complete

**Post-Assessment**

**Check** Not Complete **Post-Assessment**  
**Date: Dec 10, 2010 Best Score: 29%.**  
You have not yet met program requirements. However, you may take the post-assessment again to try to improve your score.  
[Click here to take the Post-Assessment Quiz.](#)

**Certificate**

**Certificate** Youth Activities Certificate of Completion.

# Illinois workNet® Customer Group Redesign Background Information





## View Career Interest Surveys:

Workforce professionals can view the following career interest surveys once the customer saves the information within their Illinois workNet account.


### My Skills and Interests

Complete any, or all, of the interest surveys to help you find the best career path for you. Store results in a [portfolio](#) for future reference. Consider your skills and explore your interests. Find helpful resources in the Prepare for a Job section on the left.

[Instructions](#)

<a href="#">Retake Interest Profiler</a>	<a href="#">Retake SKILLS Profiler</a>
Duration :  10-20 minutes <a href="#">Click here for information on the Interest Profiler</a>	Duration :  10-20 minutes <a href="#">Click here for information on the Skills Profiler</a>
<a href="#">Work Importance Locator</a>	<a href="#">Retake Work Career Cluster Inventory</a>
Duration :  5-15 minutes <a href="#">Click here for information on the Work Importance Locator</a>	Duration :  5-25 minutes <a href="#">Click here for information on the Career Cluster Inventory</a>

[View Your Profiler Results](#)  
(My Saved Scores)



CAREER INFORMATION SYSTEM

Home | My CIS Portfolio | Log out | Quick Links

### My CIS Sorts and Assessments -- Natasha Telger

[ Privacy Statement | Report | Print ]

<b>Career Cluster Inventory</b> Interest Profiler SKILLS	<b>Career Cluster Inventory</b> My Saved Career Cluster Inventory Answers    My Thoughts <a href="#">Restore Answer Set 1</a>	[ Career Cluster Inventory ] Updated    Edit    Delete 12/4/2008    Edit    Delete
--	--	--

ted results.

# Illinois workNet® Customer Group Redesign Background Information

Choose an e-mail template and then click OK to send to indicated targets

Group Id 1020

Select an e-mail type/target user

Send email, and/or User Message  Email Only  User Message Only  Both

[Click to enter data for a custom e-mail](#)

1020

- Custom e-mail to all Customers (using below textbox)
- Select an e-mail type
- To Customers missing an SSN
- Remind all customers to update their User Profiles
- Custom e-mail to all Customers (using below textbox)

## Customer E-mail Tool:

Workforce professionals can send emails and messages to a customers' Illinois workNet account. Use this tool to send reminders, updates, event information, and more.

Choose an e-mail template and then click OK to send to indicated targets

Group Id 1020

Select an e-mail type/target user

Send email, and/or User Message  Email Only  User Message Only  Both

[Click to enter data for a custom e-mail](#)

Custom E-mail Subject

Custom E-mail Text

Words: 0 Characters: 0

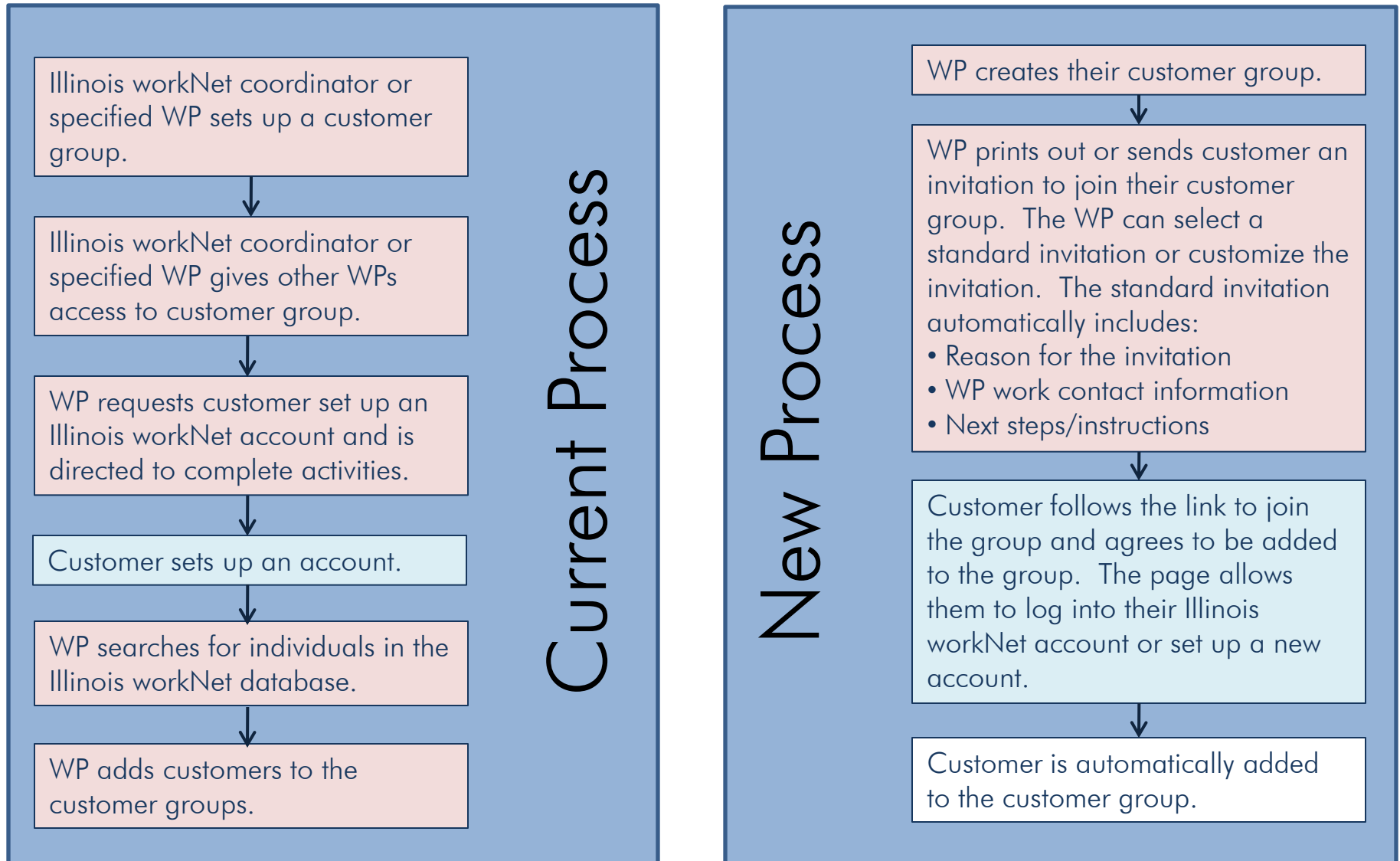
# Illinois workNet® Customer Group Redesign Background Information

Recommendations based on lessons learned from past programs, workflow studies, and feedback from the field.

- Make setting up groups easier for workforce professionals (i.e., less or no searching for customers to add them to a group).
- Single sign on for Illinois workNet workforce professional accounts and IWDS.
- Have an interface that automatically creates an Illinois workNet account when a person is entered into IWDS (or link to the customer's existing Illinois workNet account).
- Have an interface that will automatically provide activities/guidance based on the services the customer is registered for in IWDS.

# Illinois workNet® Customer Group Redesign for Use with Universal Self-Access Customers

WP = Workforce Professional with Illinois WP account



# Illinois workNet® Customer Group Redesign for Use with Universal Self-Access Customers

**Need Assistance?**

**Customer Groups - General**

Illinois workNet® customer groups self-assessments allow you to view customer activity notes, career interest survey results, and assessment scores. Customer groups also provide a way to send messages and amlatus to the entire group. Follow the steps below to get started.

[Click here to find Frequently Asked Questions \(FAQ's\)](#)

**STEP-1: Enhance your navigation through the Illinois workNet**

**STEP-2: Read instructions for setting up and using customer groups.**

**Customers**

**Add workforce professional**

Name/User Name/Birth date/Secret Answer	Contact Information /Date added to group /Work Site Evaluation	Link to IWDS status/type	View Interest Results	Customer Summary (filter by Member type)
10, NThewuser NThewuser10, Jan 01, 1990 langston 167374	2450 Foundation Dr Springfield IL 62703 temphep@illinoisworknet.com no phone nbr	Enrolled	Interest surveys not started	Type: New Customer Summary Page <a href="#">[2]</a>

Select an Invitation (standard vs custom)

Send  Email  Illinois workNet Message  Both

Print Invitation for mailing or orientation.

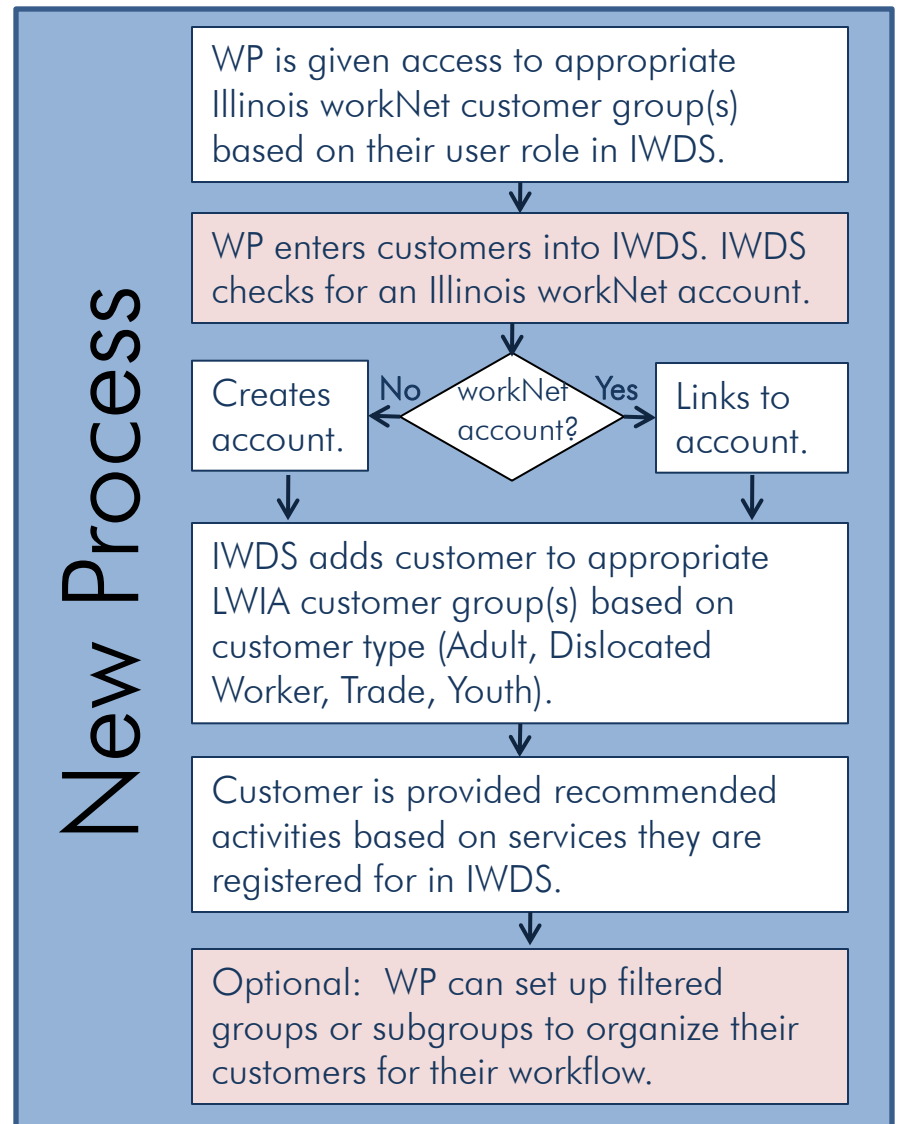
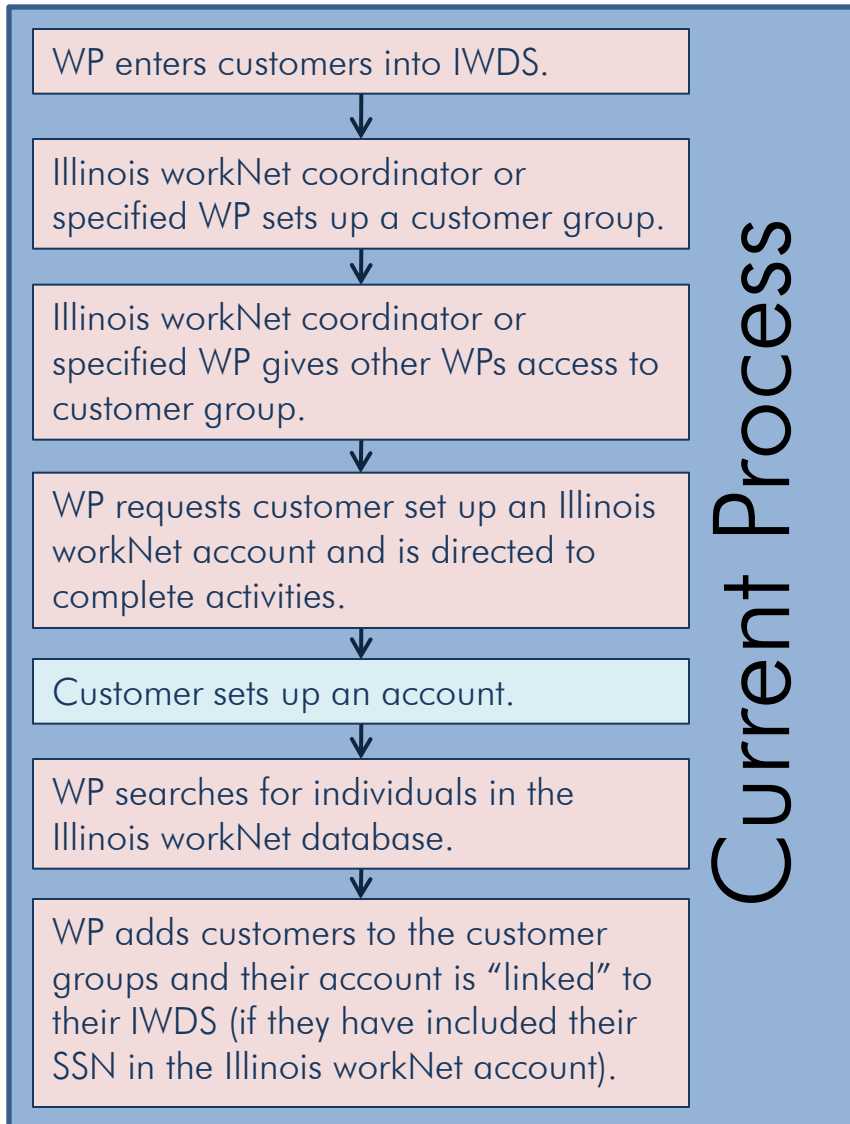
Enter email addresses to send invitation

search using one or more fields

- LWIA
- first name
- last name
- email address

# Illinois workNet® Customer Group Redesign for Use with IWDS Customers

WP = Workforce Professional with Illinois WP account



# Illinois workNet® Customer Group Redesign for Use with IWDS Customers

## Customer Groups

Illinois workNet® customer groups self-assessments allow you to view customer activity notes, career interest survey results. Customer groups also provide a way to send messages and emails to the entire group. Follow the steps below to get started.



[Click here to find Frequently Asked Questions \(FAQ's\)](#)

**SHOW** STEP-1: Enhance your navigation through the Illinois workNet

**SHOW** STEP-2: Read instructions for setting up and using customer groups.

- WP Access to customer group(s) is based on their role in IWDS.
- Customers are put into customer group(s) based on their customer type in IWDS.

## IWDS Customer Groups for LWIA ##

- IWDS Customers: Adult
- IWDS Customers: Dislocated Worker
- IWDS Customers: Trade
- IWDS Customers: Youth

## My Filtered IWDS Customer Groups

- Create a Filtered IWDS subgroup
- Adult: Intensive services
- Adult: Follow-up customers
- Dislocated Worker: Location ABC
- Youth: Location XYZ

Optional

Select a group (drop down)

Enter Group Name

Enter Group Description

Select group members



Name/User Name/Birth date/Secret Answer	Contact Information /Date added to group /Work Site Evaluation	Link to IWDS status/type	View Interest Results	Customer Summary (filter by Member type)
10, NTnewuser NTnewuser10, Jan 01, 1990 langston 167374	2450 Foundation Dr Springfield IL 62703 temphelp@illinoisworknet.com no phone nbr	Enrolled	Interest surveys not started	Type: New Customer Summary Page <a href="#">[x]</a>

use multi-select

# Illinois workNet® Customer Group Redesign

## Next Steps

### Phase 1

- Status - Completed.
- Transition process to allow all individuals access to the activities and assessments.

### Phase 2

- In Process to complete June 2011.
- Auto-update customer data between Illinois workNet and IWDS.
- Validate the need for activities written for youth, adult, or dislocated workers.
- Develop additional activity topics.
- Incorporate worksite evaluation.

### Phase 3

- In Process to complete June 2011.
- Implement a process for recommending activities based on IWDS service level/activities.

# Illinois workNet® Customer Group Redesign

## Next Steps

- Review the My Activities on the Individuals Pathway and Workforce Professionals Pathway.
- Use the forum to provide suggestions for additional activities you would use with your customers.
- Identify which customers with your activity suggestions (Adult, Dislocated Worker, TAA, and Youth).
- Watch for future surveys and webinar announcements to collect your feedback.

