

# IWDS 2.0

IWDS 2.0 CAREER PLANNER LEARNING  
SERIES

# Session 1: Introduction to Customer-Centered Service Delivery and the Career Planner Workflow

# Recording Notice

The Illinois Department of Commerce and Economic Opportunity (DCEO) allows for the recording of audio, visuals, participants, and other information sent, verbalized, or utilized during business-related meetings. This meeting is scheduled to be recorded by DCEO.

- ☐ Your participation in this meeting without expressing an objection to recording will be treated as consent. Any participant who prefers to participate via audio only should disable their video camera so only their audio will be captured.

# Virtual Meeting Guidelines

**1**

## **Minimize Background Sounds**

Mute your phone or computer microphone when you are not speaking to keep the session clear and focused for all participants.

**2**

## **Be Present**

Use the "Raise Hand" reaction to indicate you'd like to speak aloud. Wait until you're called on. Stay engaged and minimize distractions during the session.

**3**

## **Engage Everyone**

Turn on your camera if you feel comfortable doing so. Put any questions or comments in the chat so everyone can benefit from the discussion.



# Today's Learning Objectives

By the end of today's session, you'll have a clear picture of what Customer-Centered Service Delivery means for your work, how IWDS 2.0 supports it, and what your learning journey looks like going forward.

## 1 Understand Illinois' Vision

Explain why Illinois is adopting Customer-Centered Service Delivery statewide and what it means for you and your day-to-day work.

## 2 Name the Key Elements

Identify the core elements of a customer-centered approach and recognize how they already show up in your interactions with customers.

## 3 Explore IWDS 2.0 Design

Understand how IWDS 2.0 was intentionally designed to meet the real needs of both customers and career planners.

## 4 Describe the 6-Phase Workflow

Walk through the 6 phases of the IWDS 2.0 career planner workflow and understand how each phase supports better service delivery.

## 5 Map Your Learning Journey

Understand the Career Planner Learning Series structure and how it will support your successful adoption of IWDS 2.0.

# Today's Agenda

This session is structured to take you from the big picture of why we're changing to the practical details of what's changing and how you'll be supported.



**1**

## Part 1

Career Planner Training



**2**

## Part 2

Customer-Centered Service Delivery



**3**

## Part 3

Policies, Processes and IWDS 2.0 Alignment



**4**

## Part 4

Career Planner Workflow in IWDS 2.0

# Chat Storm ⚡

We want to hear from you! In the chat, please share:

## 👋 Your Name

Introduce yourself so the group knows who's in the room today.

## 📍 Your LWIA

Let us know which Local Workforce Innovation Area you're representing.

## ❤️ Your Favorite Part of the Job

Share 1-2 words or a short phrase that captures what you love most about your work as a career planner.

## 🚀 What You're Excited About for IWDS 2.0

Share one thing you're looking forward to – or hoping to see – with the upcoming changes.



# Career Planner Training

A comprehensive training program to prepare Illinois career planners for the launch of IWDS 2.0 and customer-centered service delivery on July 1, 2026.



# Preparing for Launch: July 1, 2026

A robust, multi-layered support plan is in place to ensure every career planner is ready and confident before go-live. Here's what's coming your way:

**1**

## **Local Policy Updates**

LWIA leadership is working now to update local policies and procedures to align with statewide customer-centered standards.

**2**

## **Career Planner Learning Series**

Multiple virtual training sessions covering policy, procedure, and workflow — available in May 2026.

**3**

## **IWDS 2.0 Navigation Training**

A 2-day in-person, hands-on training experience in June 2026 — led by one of your peers.

**4**

## **Desk Aides & Support Tools**

Comprehensive desk aides, regional Points of Contact for technical questions, hyper-care tech support, and (later this summer) online courses.

# Career Planner Learning Series

VIRTUAL

MAY 2026

Six focused virtual sessions will walk career planners through the complete workflow — from first contact with a customer to account access in IWDS 2.0. Each session builds on the last to give you a full picture before in-person training begins.

01

## Session 1: Customer-Centered Career Planner Workflow

An overview of how the full workflow is structured around the customer's journey, not the system's requirements.

03

## Session 3: The Getting Started Assessment

How to conduct assessments that support individualized service planning rather than one-size-fits-all categorization.

05

## Session 5: The Referral System

Navigating referrals to partner services and supports to ensure customers get holistic, coordinated assistance.

02

## Session 2: Intake and Eligibility Workflow

Step-by-step guidance on gathering information and determining eligibility in a welcoming, customer-centered way.

04

## Session 4: The Career Plan Workflow

Building and maintaining career plans as living documents that evolve with the customer's goals and circumstances.

06

## Session 6: IWDS 2.0 Account Access for Career Planners

Practical guidance on setting up and managing account access so you're ready for day one.

# Career Planner IWDS 2.0 Navigation Training

IN-PERSON

JUNE 2026

This immersive in-person experience is designed to build real confidence — not just familiarity — with IWDS 2.0 before launch day arrives.

## 2 Days of Training

Extended time allows for deep practice rather than a rushed overview, giving you space to ask questions and build fluency.

## Hands-On Learning

You'll work directly in the system, practicing the actions and screens you'll use every day — not just watch a demo.

## Peer-Led Instruction

Training is led by one of your peers — someone who understands your real work context and can speak your language.

## Multiple Scenarios

You'll practice the most common customer situations you encounter, so you're ready for what actually happens on the floor.

PART 1

# Customer-Centered Design in the Illinois Workforce System

In this section, we explore the vision behind Illinois' shift to Customer-Centered Service Delivery—what it means, why it matters, and how it connects to the work you already do every day as a career planner.



## **Illinois is embarking on an ambitious effort to align policies, procedures, and technology with customer-centered design and service delivery best practices.**

This work builds on the strong foundation already in place across the system and is designed to better reflect the thoughtful, customer-focused work happening every day in local areas.

This statewide initiative touches every part of how workforce services are planned, delivered, and documented—bringing together updated policy, modernized systems like IWDS 2.0, and a renewed commitment to treating every customer as an individual with unique needs, goals, and circumstances.

# Key Elements of Customer-Centered Design and Service Delivery

Customer-Centered Design isn't a single action—it's a set of interconnected principles that shape how we engage with every person who walks through our doors.



## Individualized Services

Ensuring tailored support that reflects each customer's unique situation.



## Respect & Dignity

Demonstrating empathy, understanding, and genuine appreciation for each customer's perspective and lived experience.



## Empowerment & Choice

Supporting customers in making informed decisions about their own goals, pathways, and services.



## Collaboration & Partnership

Working *with* participants as partners.



## Strengths-Based Approach

Building on what customers already have—assets, skills, and resilience—rather than focusing only on deficits.



## Holistic Support

Addressing employment, education, and supportive services together so barriers don't stand in the way of progress.



## Continuous Improvement

Actively seeking and using participant feedback to make services better over time.

# Illinois' CCD Vision Reflects What Career Planners Already Know

Customer-Centered Design isn't a foreign concept—it's a formal recognition of what skilled career planners have always understood to be true.

## **Strong Relationships Matter**

Outcomes improve measurably when customers feel genuinely heard, respected, and valued throughout the process—not just processed.

## **No Two Customers Are the Same**

Effective service has always required flexibility, judgment, and a willingness to meet people where they are—not where a form expects them to be.

## **Career Planning Is a Partnership**

Real progress happens in collaboration, not in transactions. Customers need a guide and an ally—not just a case number.

## **Barriers Are Real**

Progress often depends on coordinated, holistic support. CCD provides a **statewide framework** so career planners aren't carrying that responsibility alone.



# Our Statewide Adoption of Customer-Centered Design Focus Areas

## Focus Area 1

### Elevating Relationship-Driven Practice

Formally naming, recognizing, and supporting the relational work that leads to better outcomes for customers.

## Focus Area 2

### Providing the Same High-Quality Services Everywhere

Ensuring that every customer—regardless of where they start—receives consistent, high-quality service across all of Illinois.

# Elevating Relationship-Driven Practice

## What IWDS 2.0 is Supporting


Federal compliance remains important—but we are elevating the relational work already happening—work we all know leads to better outcomes.

- Building trust and authentic connection
- Identifying and addressing barriers early
- Setting meaningful goals *with* customers
- Following through and staying engaged over time
- Coordinating the right mix of services

## What This Means for You

Career planners' roles as **guides, partners, and problem-solvers** are being formally recognized and supported at the statewide level.

Policies, procedures, and systems are being redesigned to better reflect the real, complex, relationship-driven work you already do—every single day.

 This isn't new work. It's your work—finally reflected in the system.

# Same High-Quality Services Everywhere

Career planners across Illinois already provide strong, thoughtful service. This shift ensures that **customers experience that same quality no matter where they start.**

## Our Shared Commitment

- Customers can walk into *any* American Job Center and get help
- The process is clear, predictable, and welcoming
- There is **no wrong door**

## What This Supports

- **Consistency** for customers across all local areas
- **Clarity** for staff in daily workflows and decisions
- **Easier collaboration** across local workforce areas

📄 Standardization here isn't about sameness—it's about making sure **good service isn't dependent on location.**

# How Are We Doing This?

Achieving Customer-Centered Service Delivery statewide requires change at every level—not just one piece of the puzzle, but a coordinated redesign of policy, local procedures, and the technology that supports your work.



## Updated Statewide Policy

New statewide policies establish clear, consistent expectations for customer-centered service across all Illinois workforce programs and local areas.



## Updated Local Policy & Procedures

Local policies and procedures are being revised to align with statewide standards while reflecting the specific context of each Local Workforce Innovation Area.



## A New Case Management System

IWDS 2.0 is the technology backbone of this transformation—designed to reduce friction and give career planners more time for meaningful customer conversations.

We are redesigning **policy, procedures, and technology** together so that each reinforces the other—and so career planners can spend more time on what matters most.

# This Change Is Happening on July 1 — and We Know It Affects You

The transition to new policies, procedures, and a new case management system represents a **real and significant shift** in how work gets done. That deserves to be acknowledged directly.

## → **This Is Not Just a New System**

It changes workflows, procedures, and daily work. IWDS 2.0 will approach familiar tasks in new ways.

## → **It Affects How You Work With Customers**

How you plan for, document, and move customers through services will change. Learning IWDS 2.0 means unlearning some old ways of working.

## → **This Will Look Different Across LWIAs**

Change will vary locally as each LWIA works to adopt consistent statewide practices in a way that fits their context.

- ❑ **Feeling stretched, uncertain, or slower at first is expected and normal.** Your experience matters. This transition recognizes the expertise you already bring—and that adapting to change takes time.

**But you're not alone-** the State will continue to support you through this transition.

# We Are Supporting You Every Step of the Way

You are not expected to navigate this change alone.

## Training

Training is designed to support **both the system and the practice changes**—not just the technology, but the new ways of working with customers.

## Time to Build Confidence


You'll have dedicated time to learn, practice, and build confidence before and after go-live on July 1.

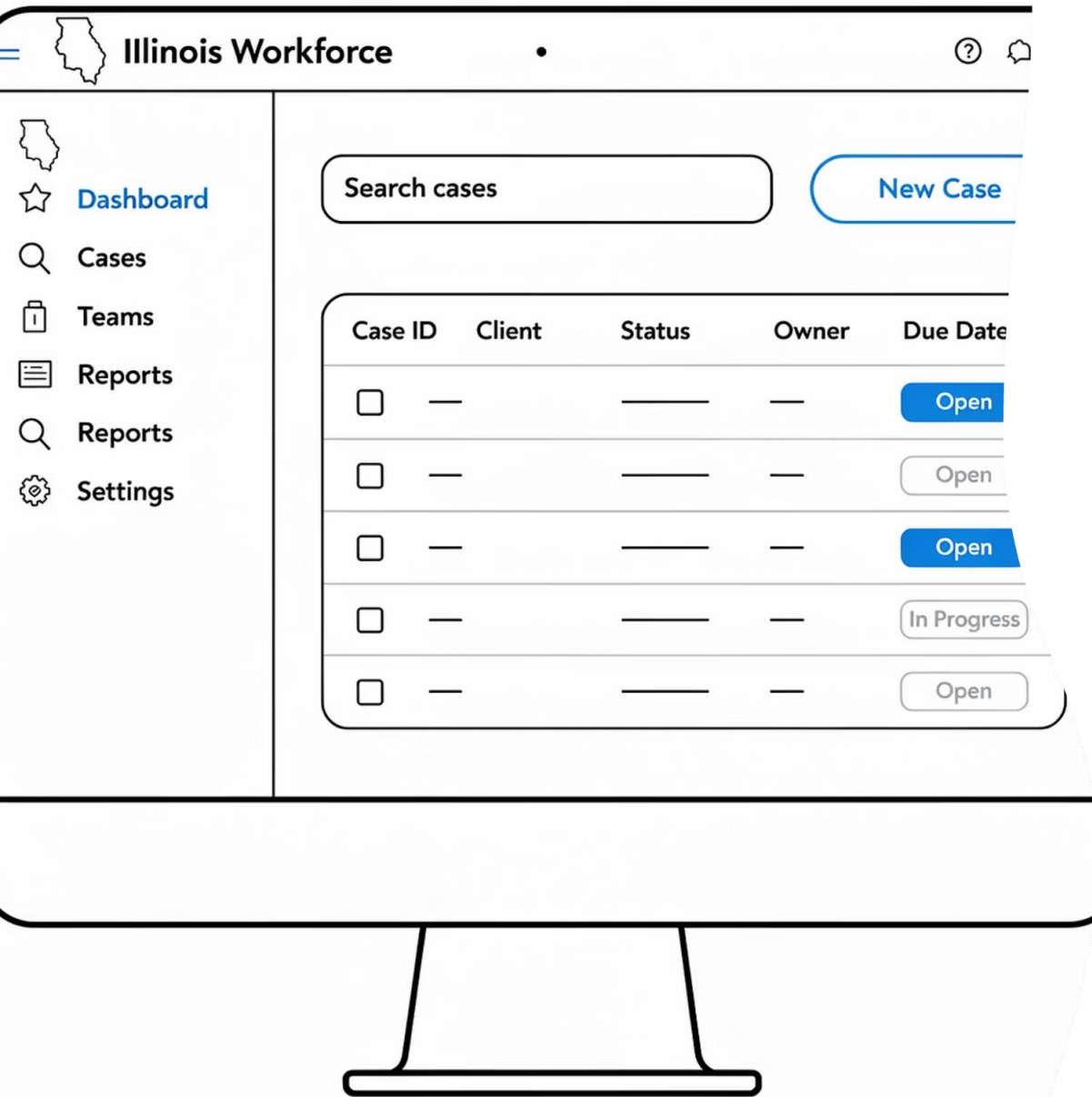
## Tools & Resources

Desk aids, worked examples, and refresher resources are built into the rollout so you always have something to reference.

## Feedback Loops

Your feedback helps improve training and system use over time. You have a voice in how this rollout continues to evolve.

 Our shared goal: To support you so you can focus on what matters most—**serving customers effectively in a customer-centered way**, using IWDS 2.0 as a tool, not a burden.



## PART 2

# Policies, Processes, and IWDS 2.0: Built to Support Customer-Centered Design and Service Delivery

In this section, we explore how IWDS 2.0 was intentionally designed—and what makes it different from systems career planners have worked with before.

# The Technology and the Standard

## **IWDS 2.0 Is the Technology**

The new case management system gives career planners the tools to document, plan, and coordinate services efficiently—reducing administrative friction and supporting better decisions.

## **Customer-Centered Design Is the Standard**

The system exists to support the standard—not define it. Our updated policies and processes are designed to reflect and reinforce the customer-centered work already happening across the system, allowing staff to focus on what matters most: partnering with individuals to meet their unique needs, goals, and circumstances.

"IWDS 2.0 is the tool. Customer-Centered Service Delivery is the practice. Together, they make better outcomes possible."

# IWDS 2.0 Was Co-Designed to Reflect How Career Planners Work

IWDS 2.0 wasn't built on assumptions about how systems should work—it was built around how **career planners and customers behave** in real service environments.

## Multiple Entry Points

Customers don't always start the same way. IWDS 2.0 accommodates the real variety of how people enter and engage with workforce services.

## Ongoing Assessment

Assessment isn't a one-time data collection event—it's a continuous process that evolves as customers' needs, goals, and circumstances change.

## Career Plans as Living Tools

Career plans in IWDS 2.0 are designed to be updated, revisited, and co-owned with the customer—not treated as static compliance forms.

## Documentation That Explains Decisions

The system supports documentation that captures the *why* behind decisions—not just the *what*—so the record reflects real service, not just compliance checkboxes.

 The system and our policies and procedures are adapting to the work—not the other way around.



# How Did Illinois Design IWDS 2.0 to Be Customer-Centered?

Rather than building a system that simply captures data, Illinois designed an experience that supports people at every step of their workforce development journey.

"We started by asking: What does it feel like to navigate government services when you're looking for work, seeking training, or trying to build a better future? The answers to that question shaped every decision we made."

This required thinking differently about technology, policy, and service delivery—centering the human experience, not the administrative process. The result is a system that works *for* career planners and customers alike.

# IWDS 2.0: **Customer Centered** From the Start

The new case management system was designed with both the customer and the career planner in mind. We focused intentionally on how the system feels and functions for anyone using it—regardless of where they start—so it better supports a consistent, intuitive experience for all.

## **Intuitive Staff Tools**

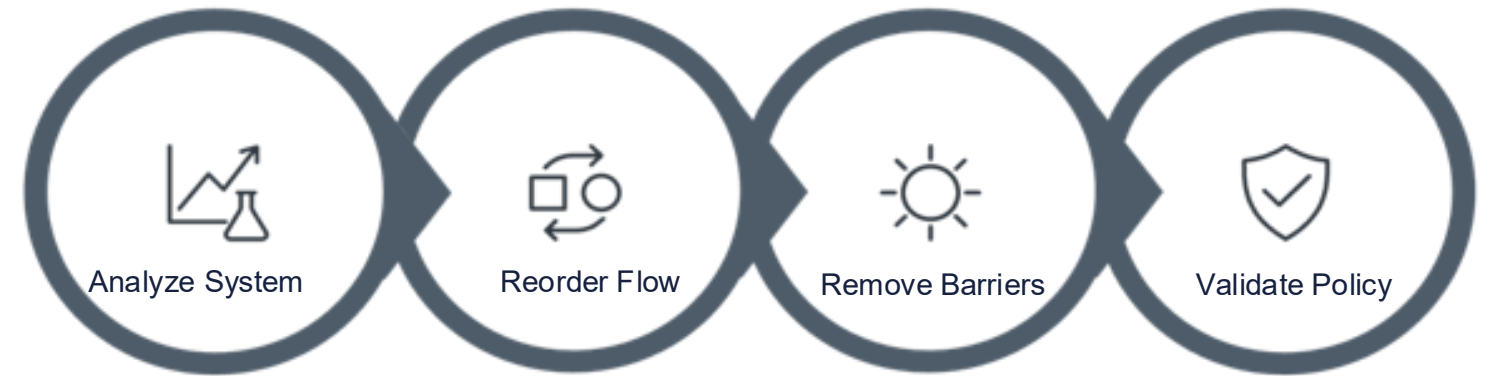
A system that is intuitive for career planners, enabling them to focus on relationship-building rather than navigation.

## **Clearer Customer Experience**

A process that is clearer, easier, and more supportive for customers navigating their workforce journey.

## Breaking It Apart & Rebuilding It

We pulled IWDS apart to review it piece by piece, examining every question, every required field, and every step in the process with fresh eyes and a customer-first mindset.



**1**

### Reorder Steps

Reordered steps so the flow feels more natural and logical from the customer's perspective.

**2**

### Move Questions

Moved questions to better moments in the process where they make contextual sense.

**3**

### Remove Burden

Removed or revised questions that didn't have a clear purpose or added unnecessary burden.

**4**

### Validate Policy

Ensured the system met all federal policy requirements while maximizing flexibility for local areas.

# What We Kept — **And Why It Matters**

Every question and every process retained in IWDS 2.0 serves a clear, deliberate purpose. We eliminated elements that existed simply because *"that's how we've always done it."*

## **Help Customers Move Forward**

Remove unnecessary barriers so customers can progress through their workforce journey with confidence and clarity.

## **Support Staff Effectiveness**

Give career planners the tools and information they need to provide better, more personalized support to every customer.

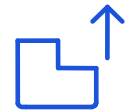
## **Ensure Compliance & Reporting**

Capture the necessary data for federal compliance and performance reporting—embedded naturally into the workflow.

Every question and process in the system has a reason. Nothing is there by accident.

# What This Looks Like for **Career Planners & Customers**

The redesign enhances your work and improves the customer experience. IWDS 2.0 creates a fundamentally different interaction—one that respects your time and theirs, acknowledges their situation, and guides them forward with clarity.



## **Clear Steps & Expectations**

Customers always know where they are in the process and what comes next—reducing anxiety and building trust.



## **Fewer Repeated Questions**

Unnecessary and redundant questions are eliminated so customers don't have to repeat themselves at every step.



## **Goal-Aligned Support**

The system surfaces services and support that align with each customer's specific goals and circumstances.



## **Respectful of Time**

Every question serves a clear purpose, making interactions feel purposeful rather than burdensome.



## **Intuitive Navigation**

Questions build upon one another logically, and only relevant questions appear based on the customer's situation.

PART 3

# The WIOA Title I Statewide

Powered by IWDS 2.0

## Career Planner Workflow

This section introduces the end-to-end statewide career planner workflow that forms the foundation of how career planners and customers will interact in IWDS 2.0—from first contact through follow-up.

# The Career Planner Workflow is Now **End-to-End** and **Shared Statewide**

One of the most significant shifts in IWDS 2.0 is the move from locally developed workflows to a single, unified statewide process. Every customer now experiences a consistent, high-quality journey regardless of where they enter the system.

## Legacy

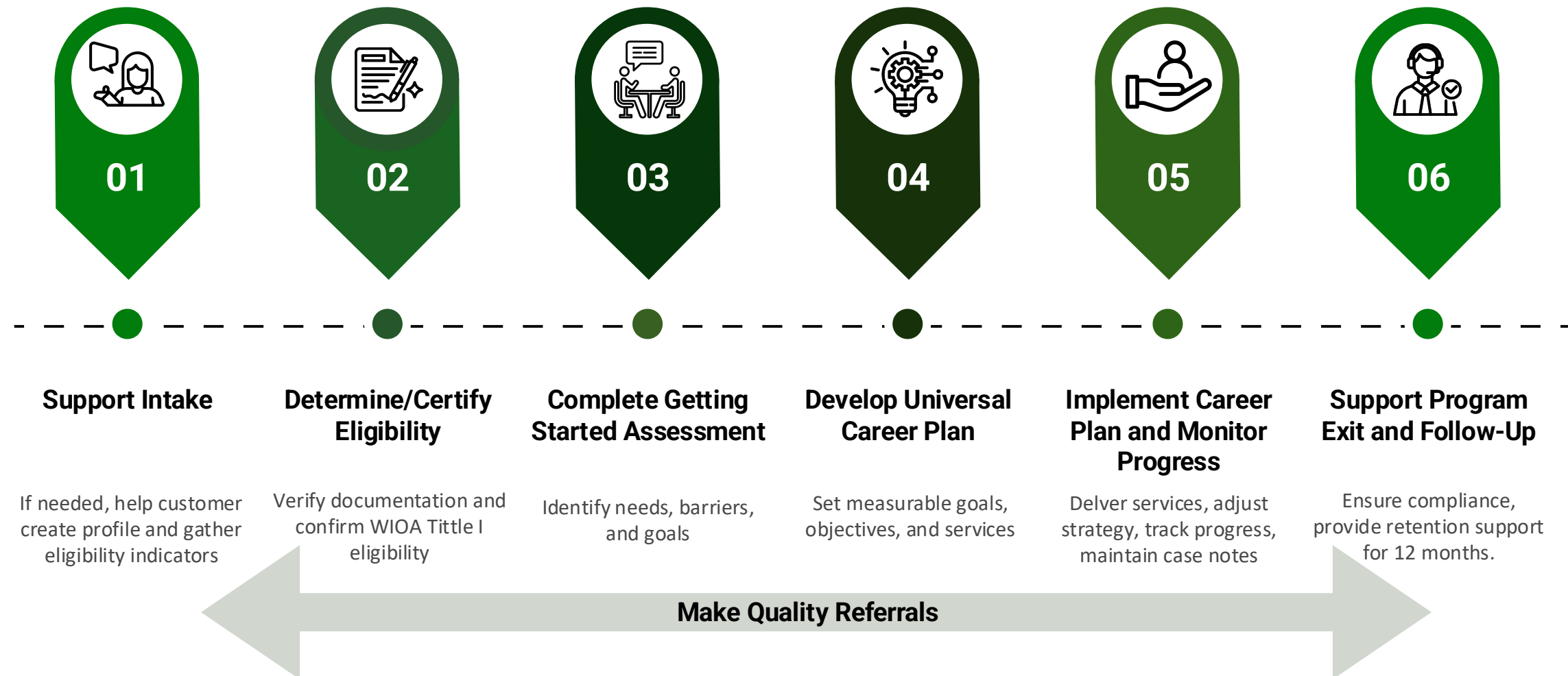
- Each local area developed its own case management workflow and practices
- Customers' experiences could vary significantly depending on where they entered the system
- Inconsistency made cross-regional reporting and quality assurance challenging

## Now

- Statewide workflow follows the customer's journey from intake through follow-up
- Local practice still matters, but the core steps are consistent everywhere
- Consistency ensures consistent access and improves statewide outcomes

# Career Planner Workflow as Supported by IWDS 2.0

The statewide workflow guides career planners and customers through a structured, consistent journey from first contact to long-term follow-up. Each phase builds on the last to ensure no step is missed.



COMING SOON

# Future Trainings Will Provide **Details on Each Phase**

The full Career Planner Learning Series will walk through each phase of the workflow in depth—providing the policy context, procedural guidance, and hands-on system navigation you need to feel confident on day one.

- 📄 For now, we'll highlight a few key shifts that reflect the most important changes career planners will notice as they begin working in IWDS 2.0.

# Customers Now Have **Multiple Options** for Beginning Their WIOA Title I Journey

IWDS 2.0 recognizes that customers come to services in different ways and at different stages of readiness. The system is designed to meet them where they are.

## Legacy

- Most customers started only when they met with a career planner or intake coordinator
- Intake steps were mostly staff-driven, with little room for customer self-initiation
- If a customer started on their own, staff often had to begin the process over from scratch

## Now

- Customers may begin on their own, with staff, or through a hybrid approach
- Career planners may pick up the work mid-stream, rather than starting from scratch
- This flexibility reduces duplication of effort and respects the customer's time and agency

# IWDS 2.0 Uses Customer-Centered Language

## Legacy

- Translating twice: one version for customers, another for the system
- System language didn't match natural conversations about goals and strengths
- "Good conversations" and "good documentation" felt like competing demands

## Now

- Plain, asset-based language used throughout the entire workflow
- What's said to customers aligns with what's documented in the system
- Compliance is fully met—embedded in clearer, more supportive wording

# Information Collection is Streamlined

One of the most common frustrations in the legacy system was fragmented data collection. IWDS 2.0 changes this by making information flow naturally through a connected workflow.

## Legacy

- Customers were often asked for the same information more than once
- Data collection happened in pieces, across forms, systems, and conversations
- It wasn't always clear how information collected early would be used later

## Now

- Information is collected as part of a connected workflow, not in isolated steps
- Data gathered at intake, eligibility, and assessment carries forward automatically
- Each question has a clearer purpose tied to eligibility, planning, or services

# The System Actively **Manages Follow-Up**

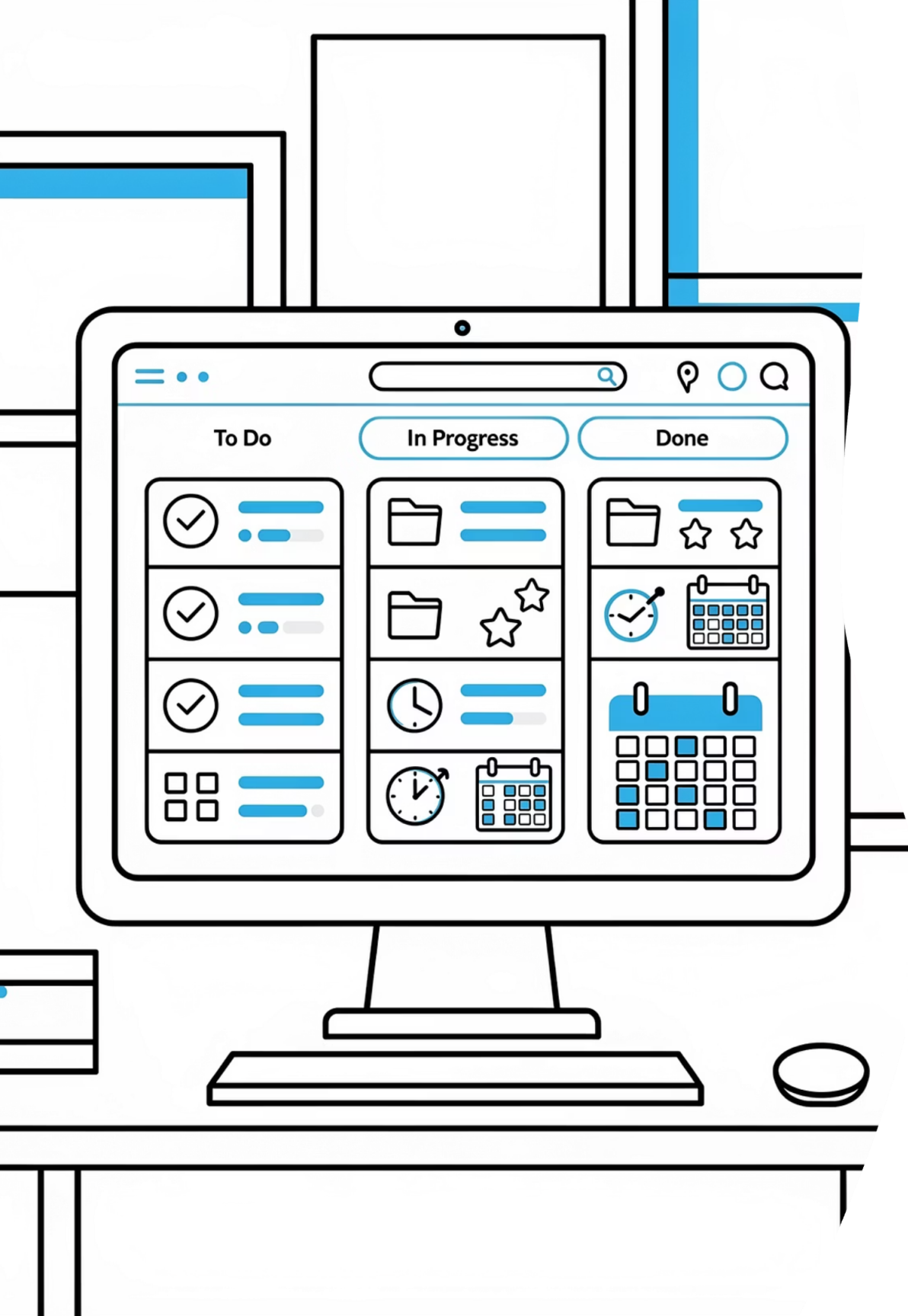
IWDS 2.0 introduces built-in mechanisms to keep cases moving and follow-up expectations clear—reducing the risk of cases going stale and ensuring customers receive consistent support through exit and beyond.

## Legacy

- It was easy for cases to stay open without clear movement or milestones
- Follow-up expectations after exit were uneven across local areas
- Accountability for case activity depended heavily on individual practice

## Now

- Applications automatically close or delete if there is no activity within defined timeframes
- Case notes are expected regularly and are built into the workflow rhythm
- Follow-up after exit is clearly defined and consistently built into the statewide process



PART 4

# Overview of the **Career Planner Learning Series**

This section provides a roadmap for the full suite of training resources being developed to support career planners through the IWDS 2.0 transition—so you know what to expect and how to prepare.

# CCD Policy and IWDS 2.0 Launch: July 1, 2026

A comprehensive suite of supports is being put in place to help career planners transition confidently to IWDS 2.0. Training, guidance, and technical assistance will be available before and after launch.



## Local Policy Updates

LWIA leadership is working now to update local policies and procedures in preparation for July 1.



## 6-Part Virtual Learning Series

Policy, procedure, and workflow training delivered through an 8-part virtual series designed specifically for career planners.



## 2-Day In-Person Training

Hands-on IWDS 2.0 navigation training for career planners to build system confidence before go-live.



## Ongoing Support Resources

Comprehensive desk aides, regional POC for technical questions, hyper-care tech support, and online courses coming this summer.

# Career Planner Learning Series

The 8-part virtual learning series takes career planners through each major area of the new workflow—from the philosophy behind the redesign to hands-on readiness for go-live. Sessions are designed to build sequentially.

01

---

## Session 1

Overview of Customer-Centered Design and the new Career Planner Workflow

03

---

## Session 3

Overview of Getting Started Assessment

05

---

## Session 5

Introduction to the Referral System

02

---

## Session 2

Introduction to Intake and Eligibility

04

---

## Session 4

Overview of Career Plan

06


---

## Session 6

IWDS 2.0 Account Access

# Stay In Touch

Additional resources, updates, and announcements about IWDS 2.0 and the Career Planner Learning Series are available through the Illinois workNet page. Bookmark it to stay current as launch approaches.

 <https://www.illinoisworknet.com/partners/> Visit Illinois workNet for the latest training schedules, policy updates, desk aides, and technical support resources related to IWDS 2.0. (more content coming soon!)



# Thank You!

We appreciate your commitment to the customers you serve and to this important transition. Your expertise, dedication, and feedback make IWDS 2.0 possible.