Leveraging Personas

Through discovery workshops, personas were identified as key business functions and the roles involved with each were uncovered. State Bar personas will drive the design decisions made to ensure the experience meets the needs and wants of each persona.

Persona details include:

- An overview of the persona
- Business functions the persona impacts
- Pain points
- Opportunities to improve the experience
- Current state technology in use

Public Trust Liaison

Job Titles

[Public Trust Liaison]

Key Tasks:

- Receive and respond to inquiries, questions, and concerns brought by members of the public.
- Investigate inquiries to ensure proper procedures were followed.
- Educate members of the public on how the discipline system works and outline what constitutes a viable complaint.
- Record inquiries received, and manually update inquiries (Excel).
- Communicate with members of the public via phone and email.
- Assist with Licensee complaint inquiries and provide updates, and options.
- Make recommendations to Legal Advisor and document these recommendations for the Board of Trustees report.
- Assist individuals seeking information about becoming an attorney.
- Assist Admissions applicants with concerns regarding procedures taking too long or unresponsiveness from staff.
- Assign inquiries to PTL Agents.

Challenges & Pain Points:

- High inquiry volumes, causing limited time to address inquiries effectively.
- Manual data entry, and transfer of data between different applications.
- Limited automation for routine tasks requiring manual intervention.

Opportunities:

- Integrating contact center software with customer filing systems to provide PTL and agents with relevant customer information in real-time. This enables agents to have a comprehensive view of the customer's history, previous interactions, and preferences, allowing for more personalized and efficient service.
- Automatic call and inquiry logging, to capture important call details such as call duration, reason for the call, and outcome, saving agents time and ensuring accurate data for reporting and analysis.
- Integration with Omni-channel Support: As customers increasingly use multiple channels to interact with the Bar, integrating phone support with other channels like email, chat, social media, or SMS can create a seamless omnichannel experience. This allows customers to switch between channels while maintaining continuity, and PTL can have a unified view of customer interactions across channels.

Personas

Contact Center Manager

Job Titles

[Lead Program Analyst]

Key Tasks:

- Team management. Provide leadership and guidance to agents.
- Ensure agents are properly trained and equipped with the necessary resources.
- Monitor agents' compliance with State Bar policies and procedures.
- Monitor agents' performance such as call handling time, first call resolution rates, and adherence to SLAs.
- Conduct regular quality assurance checks and provide feedback to agents.
- Handle escalated issues, including PTL inquiries.
- Generate reports and conduct analysis on team performance and identify areas of improvement.

Challenges & Pain Points:

- Manual data entry in multiple systems.
- Lack of integration with key State Bar applications.
- Limited automation with certain routine tasks, such as generating performance reports or call history.
- Inefficient communication channels between agents and stakeholders.
- Challenges with extracting and analyzing data.
- Lack of real-time visibility into agent performance, and queue status.
- Complex workflows involving excessive manual steps that cause inefficiency.

Opportunities:

- Having comprehensive analytics and reporting capabilities to provide insights into contact center performance, agent productivity, customer satisfaction, and other key metrics.
- Real-time Coaching and Monitoring: Providing supervisors with real-time monitoring capabilities allows them to listen in on calls, provide instant feedback, and offer coaching to agents. This helps in improving agent performance, ensuring consistent quality, and addressing customer issues promptly.
- Implementing speech analytics software to help identify customer sentiment, detect emerging trends, and provide feedback to agents for performance improvement.
- Real-time dashboard that displays key metrics such as call volume, average handle time, service level, and agent performance can help them monitor operations and make data-driven decisions.
- Interactive reporting capabilities enable managers to access detailed insights, identify trends, and take proactive measures to optimize performance.

Contact Center Requestor

Job Titles

[Members of the Public, California Attorneys, out-of-state Attorneys, LLP/Law Corporations, Applicants, law students]

Key Tasks:

- Callers may seek guidance on the complaint filing process, required documentation, and the expected timeline for resolution.
- Inquire about Existing Complaints they have filed. They may seek updates on any investigations or disciplinary actions being taken against the attorney in question.
- Attorneys may contact the State Bar for inquiries related to their fees, membership dues, or other financial matters.
- Attorneys may seek clarification on payment deadlines, fee schedules, and any late penalties or waivers.
- Out-of-State Attorneys and Multijurisdictional Practice seeking to practice law in California may inquire about the rules and requirements for multijurisdictional practice.
- Out-of-state attorneys may seek information on the procedures for admission, reciprocity, or obtaining pro hac vice status.
- Aspiring attorneys or law students may reach out for information regarding the California Bar Exam.
- Individuals who have suffered financial losses due to the dishonest conduct of an attorney may contact the State Bar to inquire about the Client Security Fund eligibility criteria, claims process, and potential compensation they can receive.
- Attorneys may contact the State Bar to inquire about continuing legal education requirements (CLE), the number of required CLE credits, available courses, compliance deadlines, and any exemptions or extensions granted.
- Some callers may seek general information about the State Bar, its functions, and services provided.

Challenges & Pain Points:

- Lengthy wait times leading to frustration and delays in getting caller issues addressed.
- Complex and confusing processes for filing attorney complaints, inquiring about existing complaints, or navigating various requirements can be intricate and confusing.
- Lack of updates for individuals who have filed complaints or have ongoing inquiries may experience frustration due to a lack of timely updates.
- Difficulty reaching the right department
- Limited availability of resources: Some callers may struggle to find the necessary resources or information on the State Bar's website or other channels.
- Inconsistent or inadequate customer service with some representatives being knowledgeable, helpful, and responsive, while others may seem uninformed or unhelpful.
- Unclear communication channels: Callers may face challenges in determining the most appropriate communication channel for their specific inquiry causing confusion and uncertainty.
- Lengthy resolution times: Complaints or inquiries may take a significant amount of time to be resolved, leading to frustration and dissatisfaction among callers.
- Delays in addressing their concerns can result in prolonged uncertainty or prolonged periods of negative experiences with attorneys.

Opportunities:

- Knowledge Base and FAQ Resources: Creating a comprehensive knowledge base and frequently asked questions (FAQ) section on the State Bar's website can provide self-service options for callers.
- Email and Online Form Automation: Streamlining and automating the email and online form submission process can enhance efficiency and response times.
- Implementing automated workflows to ensure prompt acknowledgment of received inquiries, assign them to the appropriate departments, and track progress.
- Template responses can also be used for common inquiries to provide quicker and standardized replies.
- Chatbot Assistance: Implementing an AI-powered chatbot on the State Bar's website or other communication channels can provide instant responses to common questions and guide callers through processes.
- Implementing a callback system can offer callers the option to request a callback from a representative rather than waiting on hold. This reduces frustration and improves the overall user experience.
- Implementing automated systems to send proactive notifications and updates to callers can enhance communication and reduce the need for callers to reach out for updates regarding case statuses, deadlines, or changes in regulations, keeping callers informed and reducing their frustration.

Personas

Contact Center Agent

Job Titles

[Public Trust Representative I, II, and III]

Key Tasks:

- Handling inquiries from the public via phone calls, and emails.
- Inform callers about various programs, initiatives, and services offered.
- Assist Licensees and admission applicants.
- Troubleshooting technical problems with Licensee State Bar Profile, and address billing or account-related issues
- Document abusive customer interactions
- Assist with Attorney Complaint inquiries
- Address Admissions inquiries and explain admission requirements, application procedures, and examinations or assessments involved.
- Provide information on legal resources such as Lawyer referral services and Mandatory Fee Arbitration

Challenges & Pain Points:

- High call volumes and limited time to address each inquiry effectively.
- Dealing with difficult callers.
- Knowledge of State Bar processes and training gaps.
- Technical glitches, system outages with applications agents use daily.
- Dealing with emotional callers
- Navigating legal terminology, and familiarity with specific State Bar regulations and legal processes.
- Effectively managing call volumes while providing the necessary attention to each caller.

Opportunities:

- Continuous training on State bar programs, regulations, and legal topics.
- Access to necessary information, knowledge base and online resources.
- Establishing channels for agents to seek guidance from legal professionals within the State Bar.
- Implement quality assurance programs to review and provide feedback on agent interactions.
- Ability to generate a transcript of the call, when the caller requests ADA assistance with their complaint narrative.

Personas

Contact Center Administrator

Job Titles

[Lead Program Analyst, Principal Program Analyst]

Key Tasks:

- Monitoring agent performance, providing feedback, and addressing any performance issues.
- Determining staffing requirements based on call volumes, forecasting future demand, and creating schedules to always ensure adequate coverage.
- Tracking and analyzing key performance indicators such as average call handling time, first-call resolution rate, customer satisfaction scores, and agent productivity.
- Generating regular reports and for staff yearly Performance Evaluations.
- Collaborating with other departments to gather customer feedback and identify trends or recurring issues.
- Establishing protocols for handling customer complaints, inquiries, and escalations.
- Organizing and conducting ongoing training programs to keep contact center agents updated with product knowledge, communication skills, and customer service best practices.
- Developing training materials and delivering training sessions to enhance agent performance and customer satisfaction.
- Ensuring the contact center operates in compliance with State Bar confidentiality requirements.
- Implementing security measures to safeguard customer data and prevent unauthorized access.
- Proactively seeking opportunities for process improvements and cost efficiencies within the contact center.

Challenges & Pain Points:

- High Call Volumes: Managing a contact center with a high volume of incoming calls requires efficient workforce planning, ensuring an adequate number of agents are available to handle customer inquiries while maintaining service levels and minimizing wait times.
- Staffing and Turnover: Recruiting and retaining skilled contact center agents can be a challenge. High turnover rates can disrupt operations and increase recruitment and training costs. Finding and retaining agents with excellent communication and problem-solving skills is crucial for maintaining service quality.
- Performance Monitoring: Monitoring and analyzing contact center metrics can be time-consuming.
- Quality Assurance: Maintaining consistent quality in customer interactions is a continuous challenge.
- Emotional Demands: Dealing with irate or upset customers can be emotionally draining. Contact center administrators need to support agents in handling difficult interactions, providing guidance, and ensuring their well-being.
- Training and Development: Keeping agents trained and up to date with state Bar knowledge and customer service skills can be a challenge. Developing and delivering effective training programs while balancing operational demands requires careful planning and coordination.
- Compliance and Security: Ensuring compliance with data protection and State Bar privacy rules can be complex.

Opportunities:

- Enhance efficiency, streamline processes and workflows, reduce manual tasks and automate repetitive activities.
- Integration of multiple communication channels, such as phone, email, chat, social media, and messaging platforms. Allowing customers to choose their preferred channel and providing agents with a holistic view of customer interactions, ensuring a consistent and seamless experience across channels.
- Scalability and flexibility, allowing the contact center to adapt to changing State Bar needs and customer demands.
- Empower the contact center to adopt proactive customer service strategies (e.g., outbound customer engagement, customer surveys, etc.).
- Implementing self-service options within the new system, such as an interactive voice response (IVR) system or a knowledge base, can provide customers with the ability to find information and resolve common inquiries independently.
- Real-Time collaboration and support features like internal chat, call monitoring, and supervisor barge-in functionality enable agents to seek assistance and receive guidance during customer interactions, improving first-call resolution rates and overall service quality.
- Personalized customer engagement, leveraging the capabilities to personalize customer engagements based on historical data and customer profiles. This includes personalized greetings, tailored offers, and targeted solutions, leading to more meaningful and personalized customer interactions.