DIONA

Systems of Engagement
for Health & Human Services

A Model for Transforming Agency Efficiency,
Effectiveness and Client Satisfaction
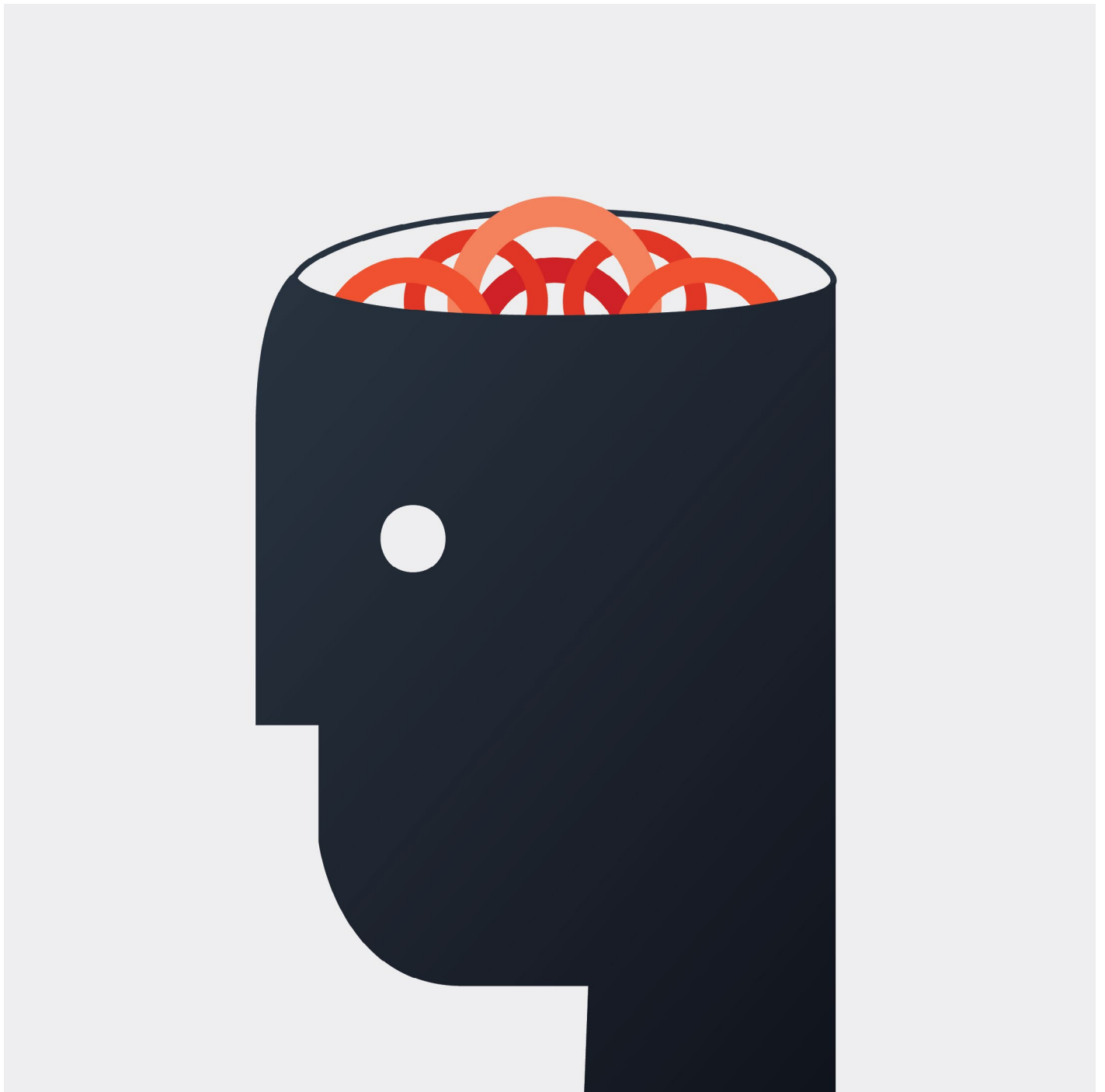
DIONA

Table of Contents

Executive Summary

In the opening years of the 21st century many enterprises have begun to recognize and act on the need for a major evolution in their IT strategy. After decades of creating and refining Systems of Record built around data and process-centric views of work, enterprises now find that approach running out of road. New and disruptive technologies, business demands, and expectations from employees, partners, and clients have all brought into focus the opportunity and need for a new approach better suited to the age of mobile devices. The challenge can be brought into focus through a simple question, "why is the technology I use at work harder to use than the technology I use at home?"

To find a response, IT departments need to update their approach from a mindset of implementing Systems of Record to one of creating Systems of Engagement. Doing so shifts the center of gravity from the server room out to the real world where existing IT investments can find new value. The change is already well underway in the commercial space. Corporations are creating new systems that support employees, partners, and customers on their terms in the time and place that meets their need. With a design approach that has shifted from inside-out to outside-in, companies are re-inventing how services are delivered, how customers are supported, and how more flexibility, efficiency, insight, and satisfaction can be offered with fewer resources.

Health & Human Services agencies with significant investments in back-office systems and business process definition are well positioned to realize similar benefits.

Introduction

In recent years IT organizations have begun a fundamental evolution from delivering and maintaining data centric, structured and transactional systems (Systems of Record) to user centric, collaborative and contextual task oriented systems. The change has been driven by the emergence of new technologies such as mobile devices and social networking and by relentless pressure on organizations to do more with less. Industry analyst Geoffrey Moore(1) coined the term System of Engagement to categorize this user-centric approach.

The transition from Systems of Record to Systems of Engagement is well underway in commercial industries, and the benefits across the board are profound. To look briefly at one sector, banks have progressed from delivering services primarily through employees in offices with limited hours to offering 24-hour automated teller machines and then on to providing services through mobile devices. At each step along the way, the banks have successfully reduced costs while improving ease of access and flexibility for their customers. Notably, the three main traditional costs and constraints to customer support are sidestepped: geographic (too few offices), temporal (too few hours), and logistical (too few tellers).

Ultimately, we see here a shift from a scarcity model rooted in how to deliver services under a fixed set of constraints to an innovation model based on how to meet customer needs in new and better ways. The constraints which defined the old system are made irrelevant in the new one.

For Health & Human Services, the Systems of Engagement model offers a similar opportunity to move goals from focusing on managing agency resources and limitations to providing clients what they need at the moment of need. To do so, agencies would do well to apply lessons from the commercial world as they create Systems of Engagement suited to their requirements.

> "...Giving employees technology they love to use isn't a superficial matter. When the user experience is delightful, employees can focus on pattern recognition and other value-adding activities instead of thinking about which button they need to press or remembering how to create a particular macro."

Geoffrey Moore

Systems of Engagement and Mobility

Traditional IT investments in industry and government were focused on Systems of Record which were built primarily to automate core business processes. The goal was to record and manage data about customers, clients, partners, and employees. These systems were designed to be structured, transactional and process oriented. Users of these systems were required to adapt and learn the systems and their workflows.

The advent of mobile, cloud, and social media over the last decade has caused a fundamentally disruptive change in user expectations. A new generation of users that Moore refers to as "digital natives" expect their workplace IT systems to offer similar context and experience as their personal social and mobile systems. This is forcing enterprise IT leaders to think about how they transform their systems to better engage with their stakeholders. Systems of Engagement are fundamentally focused on communication, collaboration, and user experience and are typically built as a layer to extend existing Systems of Record.

Leveraging existing investments in Systems of Record and developing new ways of interacting with these traditional systems through Systems of Engagement offer the Holy Grail for government and industry to better serve their new generation of digital natives.

Mobile technology adoption has grown exponentially over the last seven years and has emerged as the most important medium of communication and collaboration around the world. To understand the role of mobile devices in a System of Engagement, it's helpful to bring to mind an idea from the early days of the world wide the web: the portal. The promise of the portal was to offer a unified entry point into many systems of information. As it turned out, web sites were not particularly well suited to be portals but mobile devices are. They are rapidly emerging as the interaction point between an individual and the many information systems that he or she uses. It is not difficult
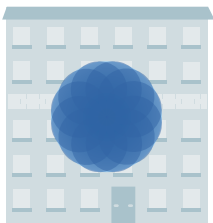
Systems of Record
Host Processes

- Inward focused
- Supported by ERP packages and large databases
- Record transactions and accounting data as part of core business processes
- Long development and deployment cycles

Systems of Engagement
Touch People

- Outward focused
- Serve customers, partners, and employees
- Enabled by mobile phones, tablets, and devices
- Delivered in an individual's personalized context
- Leverage social and cloud technologies
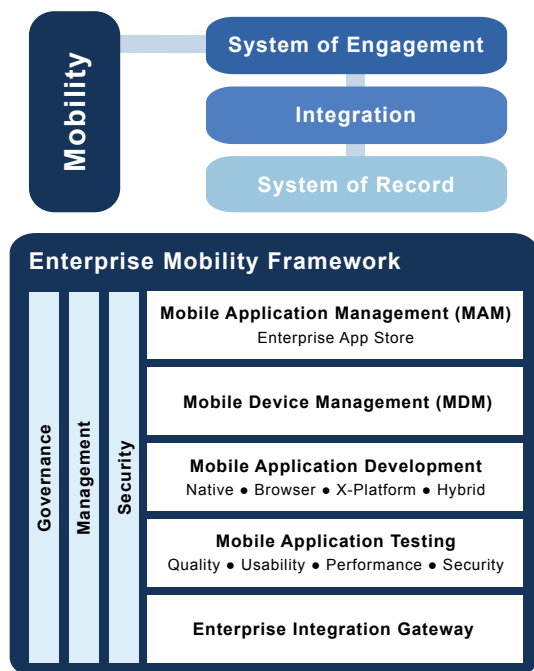- Short, rapid, and iterative release cycles

to see why. Phones and tablets are always at hand, easy to use, efficient and inherently suited for dynamic, and focused interactions at the moment of need.

Mobile devices integrated into a system of engagement can transform the cost, user experience, and results of these moments of engagement. By applying context such as the location and personal preferences of the users to the task at hand, the engagement is better suited to the needs of the moment.

In some respects, mobile devices and apps are the visible layer of Systems of Engagement. They are the front end to all the complex transactional systems that provide the information and workflow required to service the user need at that moment.

"Mobile apps are the front end and first stage of new systems of engagement that empower customers, employees, and partners with context-rich apps and smart products to help them decide and act immediately in their moments of need."

Forrester research

Mobility

System of Engagement

Integration

System of Record

Enterprise Mobility Framework

Governance

Management

Security

Mobile Application Management (MAM)
Enterprise App Store

Mobile Device Management (MDM)

Mobile Application Development
Native ● Browser ● X-Platform ● Hybrid

Mobile Application Testing
Quality ● Usability ● Performance ● Security

Enterprise Integration Gateway

Systems of Engagement for Health & Human Services

Health & Human Services agencies around the world continue to face daunting challenges including shrinking budgets, and increasing expectations from the clients that they serve.

Meanwhile social programs around the world are innovating with program and benefit delivery to shift focus from the traditional model of siloed benefit delivery to a more collaborative, holistic, and outcome-driven approach.

Agency boundaries are blurring, and clients and their needs are driving integrated service delivery models that require cross-agency collaboration in addition to collaboration with service providers and clients.

Traditional benefit and service management systems used in Health & Human Services agencies need to support this new collaborative and holistic approach to service delivery.

A quick scan of a few common scenarios in the Health & Human Services realm reveals that opportunities abound for better service through a mobility-based system of engagement:

• A client is looking for an agency office or service provider near their current location.
• A benefits recipient needs information about the status of their payment.
• A client wants to provide verification evidence without traveling to an agency office and waiting in line.
• A social worker needs to perform a care assessment in the client home while disconnected from the main office.
• A social worker is looking for the nearest available foster home to place a child at risk.
• A social worker needs to change their visit schedule and gather information in preparation for a previously unplanned client visit.

"For too long, the government has employed 20th century tools to solve 21st century problems. We fell behind in making the smart investments in technology that yield productivity gains in the private sector every day."

Steven VanRoekel
Federal Chief Information Officer
of the United States

Systems of Engagement, particularly systems built on mobile and social media as the foundational elements, offer essential and relevant support for these initiatives.

Mobile Systems of Engagement provide an opportunity for agencies to bring service delivery capabilities to the citizens in a more personalized and efficient manner. Studies have shown that leveraging of mobile tools by government organizations, if doubled (from approximately 35% to 70%), could increase efficiency, and outputs could increase by nearly $50 billion annually (2). Research conducted by the Pew Research Center found that smart phone consumption is increasing by up to 10% every year, with an increasing number of users leveraging those phones as their primary source of internet access.

Notes & References

While the use of Systems of Engagement in Health & Human Services is in its early stages, some of the more innovative agencies have already demonstrated the potential. Examples include:

• The Australian Government Department of Human Services(3) is pioneering in using mobile technology as a way of engaging with their citizens and enabling self-service.

•

• Los Angeles County, California(4) has created a mobile technology enabled Electronic Benefit Transfer (EBT) application, which helps county residents check their balance and submit income related documents from their mobile devices.

(1) http://www.aiim.org/futurehistory
(2) http://dupress.com/articles/gov-on-the-go/
(3) http://www.humanservices.gov.au/
customer/services/express-plus-mobile-apps
(4) http://cfpa.net/CalFresh/NFLAFProject/CalFresh%20
Convening%206.4.14/YBN%20Web%20presentation%20
v5-4-14.pdf

• http://www.sprinklr.com/social-scale-blog/moving-
beyond-systems-of-record-to-systems-of-engagement/

• http://www.forbes.com/sites/joshbersin/2012/08/16/
the-move-from-systems-of-record-to-systems-of-
engagement/

• http://www.forrester.com/Great+Mobile+Experiences
+Are+Built+On+Systems+Of+Engagement/fulltext/-/E-
RES85441

• http://www.sap.com/bin/sapcom/en_us/
downloadasset.2012-03-mar-01-21.mobile-is-the-new-
face-of-engagement-pdf.html

Conclusion

Embracing solutions that transform Systems of Record into Systems of Engagement poses new challenges for Health & Human Services agencies, but the potential returns are enormous. By beginning to embrace the Systems of Engagement model now, Health & Human Services agencies can pre-position themselves to launch the initiatives that will make their employees and service providers more productive and their clients better informed and better served.

About Diona

Diona provides innovative systems of engagement solutions to government Health and Human Services, Social Care, and Social Security agencies and NGOs around the world. Diona's family of social program engagement solutions, turn mobile devices—such as smartphones and tablets—into tools to achieve better business and social outcomes by helping agencies serve people more effectively, while improving how their employees work and collaborate. Diona solutions extend organizational systems of record and deliver real-time data directly into the field for clients and workers. Diona solutions are secure, robust, scalable, and reliable and feature flexible cloud-based or on-premise deployment options. With deep domain expertise and a user-centered design philosophy, Diona delivers digital solutions that help government agencies and NGOs solve real-world problems for their clients and employees.

Ireland
Charlemont Exchange,
Charlemont Street,
Dublin, Ireland,
D02 VN88
+353 1 661 8375

United States
2028 East Ben White Boulevard,
Suite 500, Austin,
Texas 78741,
United States
+1 512 692 6817

www.diona.com

info@diona.com