

Successful Case Management Strategies

As the workforce development landscape continues to change -- often requiring agencies and staff to do more with less -- pressure is increasing on a core practice that staff rely upon to successfully do their jobs: case management. From eligibility determination and data validation to continuous customer engagement to documentation of services and more, case management has taken on a new importance. For staff to balance these many complexities while remaining productivity, it requires rethinking strategies and skills.

Case management is no longer a service for just those customers who receive training as guided by a handful of specialized program staff. It is now the collective responsibility of all staff; has major implications for how teams of staff assist customers; and, necessitates standard procedures for efficiency.

Sample Agenda Topics

1. Define the **role of the Case Manager** and how staff can have success in managing multiple services throughout your community.
2. Apply the **3 what's – collection, creation, and coordination** – of case management to better assess service needs and improve customer outcomes:
 - **Collect data** on where the customer is now, where they want to go, and options for getting them there.
 - **Create (and document) service interventions** utilizing **multiple resources** to customize sets of services the customer most wants and needs.
 - **Coordinate with partner** staff, workshop instructors, and Resource Center staff to decrease service duplication.
3. Use the **3 how's – cop, coach, and consultant** – to develop a relationship with and motivate customers to make career decisions, to focus on their action plans, and to find jobs:
 - Identify the **multiple roles of case managers** and how every situation requires a choice as to **the most appropriate change tools**.
 - Build **personals skills** to ensure effectiveness in benchmarking movement toward goals and achieving customer outcomes.

4. Identify **process steps** within your service delivery which require documentation and **create case management standards** to easily find customer's actions and outcomes.
5. **Standardize case notes** to effectively share customer information among integrated staff and service delivery teams.
6. Apply **marketing strategies** to promote services and achieve **continuous customer engagement**.
7. Explore ideas to **create “cohort” customer groups** – at service entry and during program participation – in order to design and manage service activities.
8. Brainstorm **services and activities** that cohort groups have in common and discuss ways to **standardize** these services so they are available when and how customers want them.
9. Discover strategies to engage customers “over-time” and better manage your time by **determining the intensity** in which services are delivered.
10. Identify strategies and tools to assist customers **make career decisions**, focus on action plans and find jobs.
11. Provide **practical tips and how to's** for improving your partnerships, communication, and working relationships to ensure the success of your customers.
12. Develop an **action plan for addressing the needs** of customers that will enhance their satisfaction with your services and improve your required outcomes.

Customizing your training solutions provides you with the best opportunity address your specific program needs. Training solutions can be any combination of:

- **seminars** for front-line staff with action plan development for immediate implementation of ideas
- **work team facilitation** to create products, strategies, and standards for your programs
- **leadership action planning** to support the desired change

Contact Kip@GregNewtonAssociates.com to discuss the solutions which best meet your needs.