

2-2 WIC Customer Lifecycle

What is a customer lifecycle?

Customer lifecycle is a term used in business to describe the steps a customer goes through when considering, purchasing, using, and maintaining loyalty to a product or service.

For a participant to get the most benefit from WIC, it is important that we support them throughout their WIC lifecycle, so they stay on the program as long as they are eligible. In WIC, the customer lifecycle would be the steps a participant goes through from deciding to be on WIC, getting certified, receiving WIC services and benefits, and deciding to stay on WIC as long as they are eligible to do so. For some families, the WIC customer life cycle could begin when a mom is pregnant with her first child and continue until the youngest of her children is 5 years old.

What are the 6 stages of the WIC customer lifecycle?



Let's take a look at each of these stages and see your role in the lifecycle of WIC participants.



Stage 1: Awareness

- This is when someone becomes aware that the WIC program exists and that it might be something that can help them or someone they know.
- This could happen when they hear about WIC from a friend or family member; when they see an ad or social media post; or, if they get a referral from health care or service provider.
- **Your role** – You are a *WIC ambassador*. What you say to others and how you talk about the program makes a difference.



Stage 2: Learning more

- Potential participants start paying attention to what others are saying about the program. They may ask friends about their experience with WIC. They may check out social media or websites. They might learn more from their doctor or someone whom they trust.
- They might contact your office to ask about what they have to do to apply and make an appointment.
- **Your role** – You are a *WIC representative*. You help make sure that the public, health providers, and social service agency staff understand the WIC program mission and goals. This might include participating in WIC outreach activities.



Stage 3: Evaluating the benefit of being on WIC

- This is the point that a prospective participant evaluates whether the benefit of being on WIC is greater than the time and trouble of getting on WIC.
- They are figuring out what they need to bring and how they will get to the appointment.
- They need information about the program, the benefits and the enrollment process to decide if it is worth it to come to their appointment.
- **Your role** - You are a *WIC information source*. Providing good customer service makes a good impression. Providing clear and accurate information and materials makes it easier for participants to make decisions.



Stage 4: Participation

- In business this would be when someone buys the product. In WIC, this stage starts when they come to their first appointment.
- This stage includes their first shopping experience, how they use the foods they get from WIC, and the quarterly nutrition education they participate in.
- How the participant feels about these first experiences determines how much effort they put in to continuing to be on WIC.
- **Your role** – You are the *WIC service provider*. You are the one that appreciates the effort it takes to show up for the appointment. You make sure they understand what is happening, what they need to do, and how the program works.



Stage 5: Getting support

- This is the stage where participants are on the program have questions about what they are supposed to do, either in the clinic or at the grocery store. Sometimes things go wrong and they need help figuring them out.
- They need to know that someone at WIC will answer their questions and help them navigate program requirements, shopping and WIC appointments.
- In business they say that attracting a new customer is 6 or 7 times more expensive than keeping an existing one. With that in mind, you can see why many people say that this is the most important stage of the WIC lifecycle.
- **Your role** – You are the *WIC customer service representative*. You explain every step, answer every question, and help resolve problems.



Stage 6: Bonding

- This stage is when the relationship between the participant and the program is cemented.
- At this point participants may talk positively about the program and will make an effort to stay involved. They will come back to the program if they get pregnant again.
- They are more comfortable and engaged with WIC staff.
- **Your role** – You are the *WIC counselor*. You continue to provide quality service and support, nurture connections with the participant, and take every opportunity to create an emotional bond.

Learning activity



Take a look at this description of Anna's [WIC lifecycle](#).

Where would you be involved in Anna's WIC lifecycle?

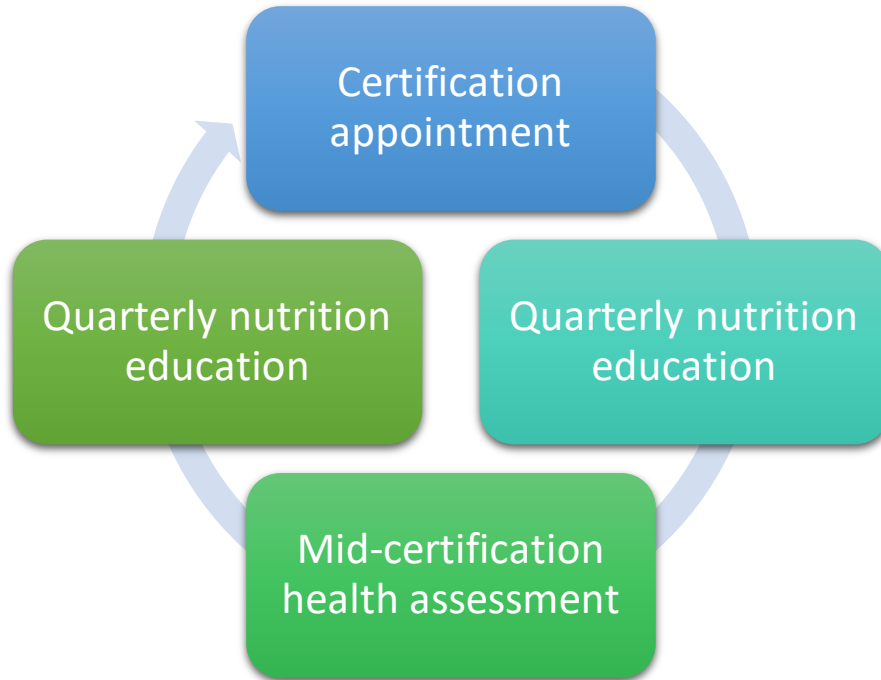
How would your role change, depending on which stage in the lifecycle Anna is in?

Based on this chart, describe a few of the contacts with the WIC program will Anna have over her WIC lifecycle?

The cycle of a WIC certification period

The lifecycle of a WIC participant can be made up of several enrollment cycles referred to as certification periods, and each certification period has its own cycle. While certification periods can vary in length, there are some things they all have in common.

1. All certification periods start with an enrollment appointment where eligibility and the length of the certification period is determined depending on the participant's category. If the participant is currently on WIC, this appointment might be called a recertification since they are already enrolled.
2. Benefits can only be issued for up to 3 months at a time.
3. Participants need to be offered some type of nutrition education every 3 months. This is considered "quarterly" nutrition education.
4. If the certification period is for one year, participants need to be seen for a mid-certification health assessment with a certifier. This appointment is very similar to an enrollment appointment, but you won't have to check proofs or determine eligibility.
5. At the enrollment appointment, the certifier develops a plan that coordinates benefit issuance and nutrition education for the entire certification period. The certifier will look at the whole certification period, not just the current appointment with the participant.



The certifier makes a plan for the certification period

At the enrollment appointment, the certifier will consider everything they have learned from the participant and use that information to make a plan. The plan for what the participant needs during their certification period is documented in their record so other WIC staff understand it and can help the participant.

Here are some of the things that a certifier must consider when making the plan:

1. What is the risk level of this participant? Will they need any special appointments, like a follow-up with the WIC nutritionist or a breastfeeding specialist or peer counselor?
2. Is there any information that WIC still needs from the participant, such as missing proofs?
3. What kind of nutrition education will be the most useful for the participant? When is that offered?
4. What referrals are needed? When will WIC follow-up on those?
5. Are there any other family members on WIC that need to be considered?
6. What month will the participant run out of benefits and need to be issued more?
7. Which food package is most appropriate for the participant? Will that change during the certification period?

8. Does the food package require medical documentation that requires the WIC dietitian to review and approve?

Learning activity



Let's go back to Anna's [WIC lifecycle](#).

How many certification periods were there during Anna or her child's time on WIC?

What kind of quarterly nutrition education opportunities were provided?

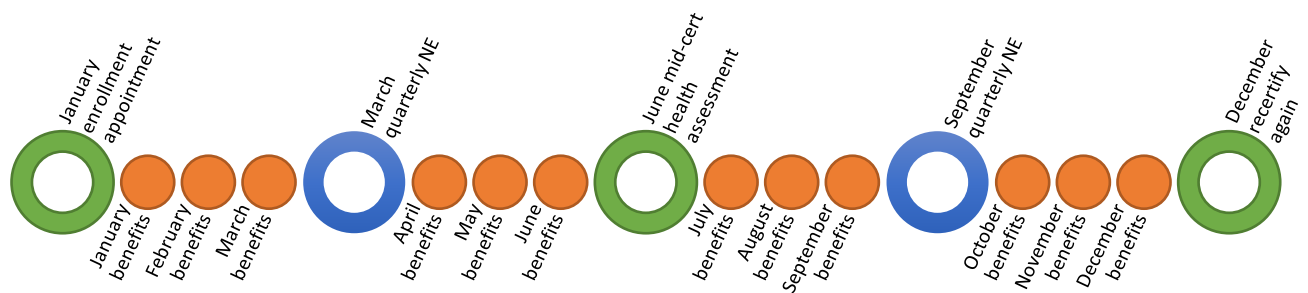
What kinds of referrals did Anna get from WIC?

Case study – Malik

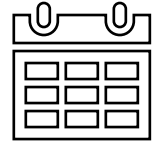


Two-year-old Malik was enrolled in January. At that appointment, Sara (the certifier) issued him January, February, and March benefits. She also scheduled his mom to complete an online nutrition class in March with instructions to call when it is done so April, May and June benefits can be issued. Sara plans for Malik to come back in June for his mid-cert health assessment. In June, Sara will plan quarterly nutrition education for September. He'll get 3 months of benefits when his mom completes each appointment.

What, if anything, do you notice about this certification cycle?



Every clinic has a cycle



Did you notice that every WIC activity is scheduled for a specific calendar month? That means that every WIC clinic has to be able to offer the activities participants need every month. Your WIC coordinator will set up a monthly schedule of activities with enough appointments for every participant your agency serves to be seen when they need to be seen. You will be scheduled for specific activities for each day you work. Your daily work schedule will likely include a variety of different types of appointments or other WIC activities.

- ✎ How many days a week is your clinic open? What are the normal clinic hours?
- ✎ What does a normal month in your WIC clinic look like?
 - When are certification or mid-certification health assessment appointments scheduled?
 - When is nutrition education offered?
 - When are staff meetings or other clinic activities scheduled?
 - Who checks for online lesson completion?
 - Where can you see the examples of what online lessons look like?
- ✎ What will your normal schedule of WIC participants be? What kind of appointments or activities will you be responsible for?

On days when you do certifications or mid-certification health assessments, you will likely be scheduled to see more WIC participants than you can easily get done. That is because there are usually some participants who don't show up for their appointments. Some days every person on the schedule will show up and you will be busy trying to complete all the certifications and other appointments. On other days, participants may not show up to their appointments and things will be a little slower. Because most clinics have very busy schedules, staying on track during appointments and dealing with time constraints will be important.

- ✎ How much time is scheduled for each appointment?
- ✎ How many appointments will you be scheduled for each day?

Talk it over

Talk with your supervisor about the WIC customer lifecycle and how your agency supports the needs of participants.

