

## CASE STUDY

# Improved Customer Service at Citizens Advice Scotland

In early 2005, Citizens Advice Scotland (CAS) appointed Pulsion Technology as the partner for a case management project which would improve its front-line customer services operation. The main objective was to provide a solution which would manage the customer service activity and improve the organisation's key function of providing information and advice to citizens.



### Improved Ways of Working

CAS is a national umbrella body which provides essential services to Scottish citizens advice bureaux. These bureaux provide free impartial information and advice on a wide range of issues to clients across the country, with over 200 service outlets in Scotland. With a large volume of clients making contact with the bureau service, and large volumes of information being handled by advisers, a web based case management solution provided an innovative and efficient way of managing the flow of information and improving the working practices across the organisation.

Pulsion Technology's Caman case manager product was implemented to automate and streamline a number of key business processes. Caman provides an end-to-end management of these business processes, which include:

- » Capturing client details
- » Profiling of clients based on pre-defined criteria
- » Capturing enquiry information
- » Escalating enquiries to team members

- » Managing call backs related to enquiries
- » Attaching electronic documents to enquiries
- » Managing feedback to staff on quality of advice given
- » Management reporting at local and national levels

Through the use of Caman case manager, which in the CAS implementation is known as CASTLE, advisers can now manage a client enquiry, with an enhanced ability to look up any previous details held on the client and any enquiries previously logged. If this information has already been logged the adviser can quickly view the profile, reducing the time taken to deal with the actual enquiry and provide the relevant information to the client. The advisers can also review previous advice given to the particular client more quickly and efficiently, benefiting both adviser and client.

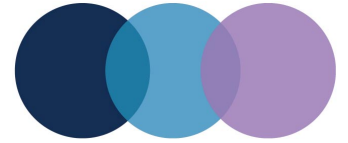
Looking up a case record is a quick and simple process with Caman. There is no need to re-enter the client's details or to leave the client to search filing cabinets for old case record sheets. It

is possible to attach any number of electronic documents, including those that have been scanned or emailed, to a case record.

Caman also provides case checking, statistical data recording and reporting functions so that statistics can be provided to stakeholders and used as social policy evidence that can lead to influencing social change.

### Project Benefits

- » Improved Social Policy and statistical data from all bureaux, made available to policy makers at national and local levels
- » Comparability between CAS and Citizens Advice Social Policy data
- » Improved quality of case records, and easier quality checking at both bureaux and national levels
- » Increased efficiency through duplication of data entry by bureaux being eliminated



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The paperwork required for these processes has decreased and information sharing around ongoing enquiries has become much more effective. This contributes to significant operational cost savings and increased turnaround times for resolution/completion.

### Integrating Systems

Calum Coulter is Head of IT at CAS and has been involved in the project from the outset. He comments, "We are a large public facing body providing extensive advice to clients on a daily basis. Key to any project we embark on is not only increasing efficiencies internally, but improving customer service. We wanted a system which would automate internal processes and reduce paperwork, but also be easy for our advisers to use.

In Caman we now have a system which logs and tracks all contact with clients and their enquiries. Caman has successfully integrated to the external AdviserNet system. This is an A-Z type knowledge-base system which provides advisers with information and guidance on welfare and social policy issues. The integrated use of both systems makes things much easier for the advisers.

They can simultaneously log client details whilst browsing the knowledge base. If they deal with a client who has previously used our service, they can reference details which may be relevant. This cuts down the consultation time and avoids

duplication of questions which have been answered in the past. The workflow element of Caman means that enquiries can be passed over to other advisers to follow up and this can be easily tracked until completion. The throughput of enquiries and clients using our service is much quicker."

### Improved Accuracy of Information

CAS sets quality standards, audits local bureaux compliance with these standards and is required to report against Key Performance Indicators (KPIs). The Caman solution has sophisticated tools which simplifies the reporting process and allows CAS to report back quickly and easily.

Calum explains, "The accuracy of information we provide back at a national level is imperative. The use of Caman has significantly reduced duplication of data and has made our task of reporting back a much smoother and less time consuming one. We can quickly run reports on data such as volume of enquiries per week, time taken to complete enquiries and the most common types of information requested by clients. The Caman system integrates with the QAS addressing software which means all address details held on clients is in a common format. This means we can accurately report on the most common client enquiries or issues by geographic area. This information is invaluable to other public sector bodies in addressing local and national issues."

### Future Phases

The Caman solution is already being implemented in five bureaux and will be rolled out across additional bureaux in the near future. The significance of the project has been recognised at the highest level with funding being provided by the Scottish Government and UK Governments to finance the roll out.

Kaliani Lyle, CEO of CAS concludes, "We were extremely pleased to have secured the funding to roll the system out nationally. The feedback from the bureaux offices using it has been immensely positive and we look forward to improving the efficiency of advice provision across the whole organisation."

### Caman Case Manager

Caman Case Manager is a web enabled case management system which ensures that cases are automatically managed through the full business process and that documents, files and tasks are stored in a central location. Cases are routed without risk of duplication and various members of staff can monitor the status of cases quickly and securely. The Caman product portfolio includes:

- » Caman Claims Manager
- » Caman Grants Manager
- » Caman Fund Manager
- » Caman Welfare to Work