



Case Study

Transforming Advice Provision at Citizens Advice Scotland

A number of years ago, Citizens Advice Scotland (CAS) appointed Pulsion Technology as the IT partner for a project which would transform case and information handling across the organisation. Following successful implementation within a number of service outlets, the Caman Case Management IT system has now been rolled out further and has made significant improvements in front-line advice provision and customer service operations.



Improving 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, from over 200 service outlets in Scotland. Historically, volunteers would handwrite enquiry forms and process the enquiries manually, which was an arduous task. As the number of enquiries and volume of information increased, there was a greater need for electronic working and case management.

Pulsion Technology's web based Caman case management solution was configured to automate and streamline a number of key business processes. Caman, which in the CAS implementation is known as CASTLE, ensures that cases are automatically routed through the full business process and that all data including documents, files and tasks are stored in a central location.

There are a number of key business processes which advisers within bureaux follow every day, in order to provide advice, put follow up actions in place and close off requests. The following key processes, which were once very time consuming and completed manually, are now managed quickly and electronically:

- » Capturing client details
- » Profiling of clients based on pre-defined criteria
- » Capturing client 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

Increased Levels of Client Service

Advisers can now manage a client enquiry, with the facility to look up any previous details held on the client and any enquiries previously logged. Advisers can quickly view the client profile and case history, reducing the time taken to deal with the enquiry and provide the relevant information to the client. The advisers can also review previous advice given to the client quickly and efficiently. This not only saves time and effort, but ensures high levels of client service and removes the frustrations which commonly occur in customer service environments, of repeating information more than once to more than one person.

For the advisers, searching the case records is a quick and intuitive process. There is no need to spend time locating hard copy paperwork. It is possible to attach any number of electronic documents, including those that have been scanned or emailed, to a case record. Therefore advisers can locate an entire case history in a matter of seconds. This functionality contributes to substantial operational cost savings and increased turnaround times for resolution/completion of enquiries.

Integrating Systems

A key factor in implementing any IT system within CAS, is the ability to integrate with existing systems and build on previous IT investment. Malcolm Melville, Head of ICT at CAS, explains, "Key to any project we embark on is not only increasing efficiencies internally, but ensuring that there is a fit with existing processes and systems. Our advisers are from a varied background and with different levels of technical skills. It was therefore essential that the system interfaced to other systems which our advisers use and that it was seamless, intuitive and easy to use, with minimal training requirements.

In Caman we have exactly that. We now have a system which logs and tracks all contact with clients and their enquiries.



Case Study

Caman has been successfully integrated with 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.

The Caman system also integrates with the QAS address software which means all address details held against clients are 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.”

Accuracy of Management Information

Caman has also improved the working practices within CAS at a management level. Malcolm continues, “As a public facing organisation, there are a number of external bodies which we are required to report back to, at a local and national level. Caman has excellent data recording and reporting functionality which simplifies the analysis and reporting process, meaning that statistics can be

easily extracted and provided to funders and stakeholders. The data is often crucial in forming the basis of publications and evidence reports, which often influences social change, therefore it is imperative that it is accurate.

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 and detect trends around advice provision, which can feed future social policy. Management information is also disseminated to all local advice bureaux which can make future planning and resourcing within the bureaux easier. The fact that the information can be pulled quickly and easily means that it can be provided more regularly.

All in all, Caman has led to positive change within the Scottish Citizens Advice Service. Our advisers are able to work much more efficiently and it has led to a better management reporting process. We are confident in the accuracy of information provided, whether it is internally, to bureaux or to Local Authorities and the Scottish Government. We are continuing to perform well against Key Performance Indicators (KPIs) and I am sure that the use of Caman has been a contributing factor in this.”

Recognition at the Highest Level

The Caman solution is implemented within a large number of bureaux, and continues to be rolled out organisation wide. The significance of the project has been recognised at the highest level as funding was provided by the Scottish and UK Governments to finance the roll out.

Malcolm sums up the project, “At the time, we were extremely pleased to have secured the funding to roll the system out nationally. The onslaught of the recession has had a massive impact on Citizens Advice as a service, with thousands more citizens relying on the service for advice, particularly around debt and redundancy. The use of Caman for electronic case processing has ensured that local bureaux have coped well with the level of demand. We manage advice provision much more efficiently and have the infrastructure to handle enquiries from over 270,000 clients per annum. I look forward to future phases of the project and seeking other ways of improving efficiency as the technology evolves.”

Project Benefits

- » Elimination of paper based processing and significant increase in advisers’ productivity levels
- » Improved Social Policy and statistical data from all bureaux, made available to policy makers at national and local levels
- » Improved quality of case records, and easier quality checking at both bureaux and national levels
- » Increased efficiency through elimination of duplication in data entry
- » Statistical reporting
- » Improved accuracy and accessibility of management information