

Citizens Advice consumer service Systems Project



July 2023

Consumer service systems (1)

- The Citizens Advice consumer service has undertaken a review of systems and decided to replace the current Client Management System (CMS) and data warehouse reporting functions of our systems with our own internal Casebook product
- This decision is not a reflection of the current systems or third party providers who we have worked well with for the duration of the systems
- The project is underway and is being co-run by the Operational team and our internal Product team
- We expect the transition to begin across Q4 2023/24 and Q1 of 2024/25 and conclude in Q2 in 2024/25

Systems Project Objectives

1

Replace Systems

Understand scale and scope of current systems and build a replacement

2

Maintain Service Delivery

Ensure continuity of service for clients and data partners

3

Keep Users Engaged

Via communication, feedback and instruction

Consumer service systems (2)

- We are reviewing all aspects of the current system to prioritise and inform our design decisions
- This specifically includes:
 - Access to case data
 - Historical data
 - Referrals, notifications and signposts
 - Transfer of data
 - Other supporting processes such as Trader Tracking
- We are still working to understand how this will directly impact the current ways of working and what input we need

Types of communication

1

General update

High level communication updating on the programme

2

User input

Requests for testing and opinions from users

3

Technical update

Communication giving instructions to users

What we've done



5 visits in
5 locations



50 cumulative
hours of
observations



Over 30 adviser
contextual inquiries



Over 80 calls
listened to



Over 120
pages of notes



1 workshop with
7 advisers



5 diary studies
comprising
64 daily logs



4 one-to-one
prototype testing
sessions

Next steps

- The early prototype of the new CMS are currently in adviser testing with lessons taken from that to keep developing the product
- 1-to-1 testing sessions with advisers, to understand how they feel about and interact with the end-to-end add a client/case & update a case journeys.
- Work is underway to look at the infrastructure for the data housing, how we send data and how partners can access data while continuing to review the impact this will have on our partners
- Our next priority is to think about what implementation of these new systems look like for both our advisers and data users and partners across the consumer protection landscape
- There will be regular updates at all our stakeholder meetings and these will be underpinned by regular updates
- Updates will be saved on the Partner Pages under the title "IT Systems Update" with a dedicated email inbox: **consumersystems@citizensadvice.org.uk**

Thank you



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