

Citizens Advice consumer service Systems Project



About the Systems Project

- We would like to tell you about the Systems Project that is now underway in the consumer service
- 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 with our own internal Casebook product
- This decision is not a reflection of the current systems or third party providers who, for the duration of the systems, have worked very well with us
- The project is under way and is being co-run by the Operational team and our internal Product team
- We expect the transition to the new system to conclude in Q2 of 2024
- This update is intended for our partners and stakeholders including partners who receive referrals, notifications and those who access data and reporting

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

Scope of new Systems replacement

- We're anticipating that as a minimum, everything you can do now with the current consumer service systems will be replicated on the new system
- This specifically includes:
 - Access to case data
 - Historical data
 - Referrals, notifications and signposts
 - Transfer of data
 - Other supporting processes such as Trader Tracking
- We're now working to understand how this will directly impact the current ways of working and what input we need
- Your input on this is very important to us, so we plan to establish ways of working that will allow a user-led approach to our systems designs

Communication methods

- We've identified the types of communication we need to share with you and we're working closely with the project team to identify a timeline of milestones
- Keeping our data users and stakeholders updated in this project is a key priority and we've conducted a mapping exercise to ensure all partners who need to be kept updated are informed
- We will ensure updates are timely and relevant by using our existing channels of information and sending updates by email when needed
- If there are any key staff you wish to be added to our lists, please email us to let us know at Operations@citizensadvice.org.uk

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

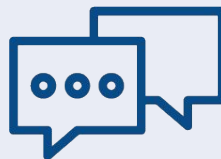
What's happened so far?



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

*minimum of 2 team members
per visit, 5 hours each



1 workshop with
8 advisers

Next steps

- The early prototype of the new CMS is currently in adviser testing
- Lessons to be 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” and “update a case” journeys
- Work is under way to look at the infrastructure for the data housing and secure referral method
- There will be regular updates at all our stakeholder meetings and these will be underpinned by bi-monthly updates in this format
- Updates will be saved on the Partner Pages under the title “IT Systems Update”
- We’ll use our existing email lists and the working groups to keep you updated
- Please keep us updated with any change in staffing or any updates to email addresses for our communications, by letting us know at Operations@citizensadvice.org.uk

Diolch/Thank you

