

Applying the principles of Customer Relationship Management to the world of adult social care

CareWorks' vision for supporting the personalisation of adult social care



careworks



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Foreword

Social care is a key area of Microsoft's Citizen Service Platform (CSP). The CSP is both a vision and a solutions platform architecture. It seeks to deliver economies of scale and flexibility, providing local authorities with the tools they need to balance tightening budgets against the needs of an ageing population and rising citizen service expectations.

Technology has an important role to play in the drive for personalisation and self-directed social care. By using technology to empower your people – both workers and citizens – you can make productivity improvements and cost savings, and you can put people at the centre of the services you provide.

CareWorks has developed CareDirector, an innovative social care management solution that harnesses both the vision and the technology of the Microsoft Citizen Service Platform. It gives you the tools to manage service provision, to manage customer contact and to deliver the efficiency savings that will make your budgets go further. It allows you to leverage existing technology investments to build a solution that you can adapt and expand as the personalisation agenda takes shape.

CareWorks is a respected leader in the provision of social care solutions and their approach is being championed by our teams as a perfect example of our vision for the transformation of health and social care.

Gordon McKenzie

**Worldwide Local and Regional Government Director
Microsoft Corporation**

Introduction

Driven by the needs of an ageing population, budget restraints, and higher expectation from citizens, the move towards personalisation is radically changing the way social care services are commissioned and provided.

This has a profound impact on the nature of social care management information systems. They need to support new ways of working and provide the tools to deliver a better and more personalised experience for service users.

Social care will remain in transition for some time to come; as new policies are formed and as the reality of personalisation takes shape. IT systems need to be able to quickly adapt and evolve so that organisations can remain flexible and responsive.

In the way that personalisation empowers people to be in control of their own social care needs, so the CareWorks vision puts the individual at the heart of the supporting information systems.

With CareDirector, CareWorks is introducing the principles of Customer Relationship Management (CRM) to the world of social care. Our unique approach moves away from the proprietary systems that have traditionally been used in social care management, to one built on an industry-standard customer service platform.

This paper examines the implications of personalisation and sets out our vision for supporting social care providers, practitioners and their clients through agile IT systems that deliver significant productivity and efficiency benefits, with tools that empower people to take control of their lives.

Giving care professionals the power to make a difference

One of the key challenges facing local authorities is that of adapting to new models of working and transforming the culture that underlies existing service provision.

The traditional social care case management approach will need a dramatic overhaul. Many authorities are starting to implement new self-directed care models as defined by organisations such as In Control, FACE and EasyCare. Effective IT systems are needed to automate and streamline the new case management processes – delivering productivity benefits and cost savings.

By putting the individual in control, personalisation fundamentally changes the role of the social worker to a positive one of advocacy, brokerage and relationship building. Social workers will be focused on ensuring the availability and quality of services that local people identify as important to them.

For care professionals to be able to make a difference, they need to be supported by the right tools. Effective IT systems will enable care professionals to record, understand and anticipate the needs of service users. They will capture all aspects of a client's interaction with their local authority, regardless of communication channel and across all areas of the organisation. They will help care professionals build a clearer picture of their clients:

- To provide better and more responsive support to service users
- To improve efficiency of service delivery
- To plan for individuals' needs and for commissioning services

Delivering a better user experience

In putting the service user at the centre of the planning process, social care providers must give them access to accurate information and self-service tools so that they can make the right choices and truly benefit from directing their own care. Personalisation requires new service delivery models and new information systems to enhance customer service and make it easy for service users to control their care.

We are generally becoming more sophisticated as consumers and citizens and have come to expect so much more in terms of quality and availability of services. We want information to be available immediately and we want to access it in the way we choose – online, through care portals, via contact centres or through mobile devices. For the more tech-savvy, web-friendly users, online participation is as natural as face-to-face communication. These people want to be involved in decision-making on all issues that affect them. They want to be able to describe their needs, participate in planning and service delivery and manage the budgets available to them.

At the same time, there are those such as older people or people with learning disabilities who still want a more traditional case management approach, preferring to be guided and have ongoing personal contact with familiar practitioners.

The move towards personalisation means that effective IT systems will have to work the way service users want them to and have the ability to handle a variety of requirements - holding a single and comprehensive source of client information whatever the model and communication channel they use to control their care.

Enabling joined-up services

The personalisation agenda cannot be delivered by social care alone. Achieving transformation will mean working beyond the boundaries of social care to incorporate other local authority services such as housing, benefits, leisure, transport and health.

People accessing social care services are also local authority customers for other services. Personalisation will work best when a council can deliver a single point of access to all of its services and provide a joined up view to customers.

To ensure that care professionals can collaborate effectively and deliver efficiencies, greater connectivity and integration between disparate information systems is required. IT systems need to be interoperable to facilitate a truly collaborative approach that can be achieved in realistic and manageable steps.

Personalisation will be the cornerstone of public services, and its supporting initiatives are fundamental components of a social care information system.

Integration with other related implementations, such as the Electronic Social Care Record (ESCR), Single Assessment Process (SAP), CAF for people with complex and long-term needs, Home Care systems, Customer Relationship Management (CRM) systems for contacts/retentions is essential.

Equally important is the ability to link to NHS systems and ICS and Transition systems, e.g. SCIP (Social Care Integration Project). Such a joined-up approach is vital for meeting the Government's vision for a modern public service.

Responding to new developments as personalisation changes the way social care is delivered

One of the biggest challenges of personalisation, for social care providers, is in moving to new working practices – both in terms of the definition of these practices and the management of resources for service delivery.

Adding to this challenge is the fact that personalisation is not yet absolutely defined. It will continue to evolve as lessons are learned and feedback translated into reform. Social care will remain in a transition stage for a few years yet. It is broadly recognised that policy direction will translate into detailed functional requirement as learning is disseminated from early adopter programmes. It is also likely that individual authorities will develop local approaches to meet the specifics of local need.

All of this means that IT systems need to support organisational agility by managing information as it exists at present, providing options for local customisation and providing the flexibility to adapt in response to the emerging needs of adult social care.

A unique customer service approach to social care

An approach that treats social care users as customers – in control of their own social care needs, deciding how they access services and how available funding should be spent – must be supported by information systems that view them as such.

Existing proprietary case management systems were designed for use by local authorities and not for access by citizens. They are practitioner rather than customer-led so tend not to offer the capabilities needed to properly support the move towards personalisation. These systems will struggle to evolve to match the pace of likely changes in social care. Any customisation of existing systems, if it is even practical, is likely to be very costly.

The CareWorks vision is for a social care management solution built on the principles of Customer Relationship Management. Our approach moves organisations away from the proprietary systems that have traditionally been used, to a solution that is built on an industry standard customer service platform. The result of this shift in thinking is CareDirector – a Microsoft platform solution that provides flexibility, is familiar and can be quickly and easily adapted to meet evolving requirements.

Personalisation is set to be the most significant reform in social care for 60 years. That's why finding the right social care management system is crucial. CareWorks is the first and only social care software company to offer a social care solution based on world leading customer relationship technology from Microsoft. CareDirector is a new social care management system that:

- Fits your citizens and empowers them to have direct input into their own social care requirements
- Fits your workforce and allows you to gradually migrate to a new way of working through the use of a familiar intuitive system
- Fits your IT requirements and allows you to keep pace with evolving requirements as lessons are learned and feedback translated into reform
- Is cost-effective and easy-to-use
- Is provided by a technology partner who understands what it takes to make personalisation a reality

Delivering better services through technology innovation – CareWorks in the Microsoft Citizen Service Platform

The Microsoft Citizen Service Platform is Microsoft's response to central government's drive for public sector organisations to provide more citizen-centric and cost-effective services through the use of Shared Services. In order to transform customer experience, local authorities need to look at wholesale redesign of processes alongside a more innovative use of technology.

The Microsoft Citizen Service Platform (CSP) provides a solution framework to address some of the key challenges faced by local government organisations – issues that cross-cut structures and services:

1. Improving customer service
2. Increasing operational efficiency
3. Compliance and accountability
4. Leveraging the power of technology
5. Caring for the environment

About CareWorks

CareWorks is a social care specialist with 11 years experience, 70 local authority customers and unrivalled understanding of the revolution taking place in the delivery and management of social care. We have extensive knowledge and experience of the requirements and business processes of adult social care. Over 20,000 care professionals are using our systems.

We are working with individual organisations, consortia and national partners such as the Department of Health, the Youth Justice Board and the Department for Children, Schools and Families.

6. Sustaining the local economy
7. Delivering social care
8. Raising standards in education
9. Collaborative working and shared services
10. Improving staff productivity

CareDirector is based on Microsoft CSP technologies for Citizen Interaction, Mobility, Collaboration & Productivity and Case and Records Management. The system delivers public-facing care portals built on Microsoft® Office SharePoint® Server and the supporting adult social care system built on Microsoft Dynamics® CRM.

We have developed relationships with key partners to ensure that we have the appropriate business and technical expertise to help you transition to personalisation over the coming years, including in Control, FACE, EasyCare and Microsoft.

We are proud to be recognised by our local authority customers and national partners for our ability to build positive, personal and open working relationships.

More information

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For more information about the Microsoft Citizen Service Platform visit:
www.microsoft.com/csp

