

CASE STUDY: Improving Access and Visibility of Advice Services



West Lothian
Council



West Lothian Council wanted to increase the visibility of, and improve access to, its advice services. It also wanted to improve its service to customers by offering more holistic support aimed at tackling the range of issues a person might face. It's new Advice Shop in the Bathgate Partnership Centre is allowing it to do just that.

The West Lothian Council Advice Shop moved into the Bathgate Partnership Centre in 2011. The Partnership Centre has a presence in the town centre and offers a drop-in service. It houses a range of council services including Adult Basic Education (ABE) as well as a library, cafe and meeting space for community groups. People have access to advice on a range of topics including money, benefits, energy and housing advice. In addition, support is available to help people towards digital inclusion and the Partnership Centre has computers with internet access that can be used by the public.



(Video opens in browser window)

What was the challenge/issue for West Lothian Advice Shop?

The Advice Shop team was previously based in a less accessible and less visible location. There was no co-location with partners which made joint-working with different teams more difficult. Clients often face multi-faceted challenges, so getting streamlined, client-centred input on a range of issues is a key objective.

The changes came about to improve access and visibility to the service as well as partnership working. The Partnership Centre approach aims to put the customer at the heart of the service provision and acknowledge the range of issues a person might face by offering more holistic support.

What was the council and its partners trying to achieve?

The Advice Shop's main objective was to give customers the support to make informed choices and to improve their situation

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(e.g. in relation to money, housing, employment, wellbeing, relationships)
by:

- improving the customer journey
- improving access and visibility of the service
- improving partnership working and referrals
- Also, to help customers to make better informed decisions which improve their wellbeing, reduce indebtedness and poverty levels.

How did West Lothian Advice Shop tackle the issue?

Move into Partnership Centre and customer journey

With the move into the Bathgate Partnership Centre, the Advice Shop now has a visible presence on the high street and can offer a drop-in service. Advice staff are co-located with Adult Basic Education services and work closely with them. Customer Information Staff (CIS) deal with customer enquiries as they drop-in. They carry out an initial triage assessment ensuring that the person's needs are identified and the relevant support is provided as soon as possible.

Customer information is logged on the Customer Relationship Management (CRM) system. Following a review carried out in 2012, the corporate management team agreed to use this system for all customer contracts with West Lothian Council either through direct entry or integration with back office systems. (There are clear projects in West Lothian relating to channel shift which has three strands – Single View of the Customer, CRM Integration with back office systems and automating transactions through the web etc.) The duty manager for the Advice Shop uses the CRM system to manage the customer demand and can easily see from the system whether the customer service standards are being met and allocate resources appropriately to meet the customer's needs.

Duty managers are working on a rota system. Customers are dealt with using the 'one and done' strategy, aiming at resolving the issue within the one visit and staff are supported in applying this approach.



Performance management and outcomes

The Advice Shop has separate case forms for the CRM system. The main case form is the Initial Enquiry Case Form which holds all relevant customer information. If a customer needs advice on multiple issues, e.g. benefits, money and housing advice, all case notes will be held in the single case form which allows the adviser(s) to see relevant information without having to search through multiple case forms.

Quality and outcomes are monitored using key performance indicators

“Before when we worked at the previous Advice Shop, people were working in different parts – this way at the partnership centre we’re all together and it feels a lot more like a team.”

**Anne Stevenson, Senior
Money and Housing
Adviser**

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“It’s about sharing of good practice, training, resources and looking at how we can work smarter and fundamentally [...] helping the customer to get the best out of the advice they are given.”

**Elaine Nisbet, Principal
Officer for Adult Basic
Education**

“I like it because it shows we are treating our customers with respect [...] we can now make them feel like customers and hopefully take away the stigma.”

**Alan Cunningham, former
Advice Shop Manager**

(KPI). Performance is used to manage and improve the service. It is reported on a quarterly basis to senior officers, elected members, the public and challenged through the Public Service Improvement Framework (PSIF). KPIs are clearly aligned to the Council’s Anti Poverty Strategy and Single Outcome Agreement and reported on at both council and Community Planning Partnership Board level. The Advice Shop is using a web-based CRM system from which reports can be pulled easily by various managers. Examples of information that can be reported on include financial gain, successful appeals, number of money advice referrals, open cases, allocated cases, types of debt, evictions prevented.

The ABE team also captures number of adults it helped to improve their skills, the number of students who achieved their goals, recruitment and training of new volunteers and the number of students who achieved a qualification. All indicators that are measured are being modelled according to life stages and feed into West Lothian’s Single Outcome Agreement.

Partnership working

A range of services are located within the Partnership Centre and the team refers customers on to the appropriate service. The Advice Shop is the lead partner in developing the West Lothian’s Anti-Poverty Strategy which involves a range of community planning partners. The West Lothian Advice Network was set up to further facilitate the sharing of resources, improve referral systems and share good practice and training.

Financial education - Adult Basic Education

The Adult Basic Education (ABE) team is located in the Bathgate Partnership Centre. Co-locating the ABE team with the Advice Shop team was a conscious decision because there is significant overlap in their respective customers. The team receives referrals from the Advice Shop and other partners.

Around 80% of clients are unemployed and 40% are under the age of 25. An initial assessment is carried out with each client and the team has found that ‘not one size fits all’. Usually, the individual will first participate in an initial short course to keep them engaged and motivated. A series of tailored programmes around financial capability are then offered. Staff from the Advice Shop and the credit union are also present for some of the sessions in order to give direct input and encourage people to access further help. The ABE team has found that this is a much more effective way of referring people on for further advice instead of signposting to the services.

What obstacles had to be overcome?

Encouraging staff usage of the CRM

One of the biggest challenges initially was getting staff buy in and understanding. However through training and ongoing support from the customer service team the Advice Shop staff are now very experienced users of CRM, confidently navigating through their case forms etc as and when required.

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Further information

Advice Shop,
[www.westlothian.gov.uk/
advice-shop](http://www.westlothian.gov.uk/advice-shop)

Advice Shop and ABE Annual
Report 2013/14,
[www.westlothian.gov.uk/
CHttpHandler.ashx?id=5039
&p=0](http://www.westlothian.gov.uk/CHttpHandler.ashx?id=5039&p=0)

Money Week 2014
[www.westlothian.gov.uk/
CHttpHandler.ashx?id=4986
&p=0](http://www.westlothian.gov.uk/CHttpHandler.ashx?id=4986&p=0)

Adult Basic Education
[www.westlothian.gov.uk/
article/2272/Adult-Basic-
Education](http://www.westlothian.gov.uk/article/2272/Adult-Basic-Education)

Adult Basic Education
Newsletter Spring 2014
[www.westlothian.gov.uk/
CHttpHandler.ashx?id=3507
&p=0](http://www.westlothian.gov.uk/CHttpHandler.ashx?id=3507&p=0)

Better Off: Anti Poverty
Strategy 2014-17
[http://coins.westlothian.
gov.uk/coins/viewDoc.
asp?c=e%97%9D
d%92o%82%8E](http://coins.westlothian.gov.uk/coins/viewDoc.asp?c=e%97%9Dd%92o%82%8E)

What are the results of West Lothian's actions?

Improved access and visibility

The relocation of the Advice Shop to the Partnership Centre has improved access and visibility for citizens. People can walk in for library or digital services and can easily access advice in the one visit.

Improved customer journey

The Advice Shop team also feels that the friendly atmosphere of the building underlines a more service-oriented and customer-focused approach. In addition, waiting times have been reduced to a maximum of 45 minutes meaning anyone accessing the service for advice will receive face-to-face support on the same day. The number of citizens who access the Advice Shop has increased and it is firmly established as a recognised brand across West Lothian.

Improved partnership working

For staff, the new location has facilitated improved team relations and partnership working within the centre. Using the CRM system, handling of customer data has been made easier and reporting on outcomes has also been strengthened. The Advice Shop team have also found that there is a greater sense of customers being 'our' customers and a willingness to work collaboratively to improve outcomes.

Any lessons learned?

The Advice Shop team have found that it is easier for people to access the service if it sits with other facilities they might use. This also means it can be less stigmatising to access advice for money and debt problems. The team also highlights the advantages of co-locating with other services resulting in improved partnership working. Challenges for staff include responding to queries within 45 minutes and whoever is duty manager on a given day needs to be prepared to give advice on a range of issues. The more complex cases are handed over to a specialist adviser. It was also challenging for staff to change to the CRM system and a key learning point was the importance of communicating the changes well and offering training and support with using the system.

The Adult Basic Education team offers training for frontline staff around budgeting to show how they can help the customer at frontline level and looking at resolving revolving-door issues. The training also includes a 'spotter and referral' session to ensure staff members have the relevant knowledge to make appropriate referrals. The ABE team also found that there is a need to work with partners and key workers in order to encourage engagement and referrals to the service. It is also seen as crucial that the service is provided at a location and time that suits the customer.