

White paper

Transformation and digitising bookings and appointments processes

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The challenges and opportunities of bookings and appointments processes for local authorities

All UK local authorities offer multiple bookings and appointments processes, both to clients and internally. There is significant complexity in the bookings and appointments process because there are so many potential variations in terms of detailed requirements (more on this later) and because the need to provide bookings processes spans multiple service areas which may have very little to do with one another in terms of process design and customer requirements. Layer these process complexities and disparate service area characteristics onto an already congested technology landscape at a 'typical' UK council and the challenges magnify.

Here are some examples of real bookings and appointments scenarios that we have come across as part of recent projects with UK local authorities:

- A mid-sized borough authority wanted to create online booking and back office management of bookings for a range of council-run sports pitches. It started with football pitches. The pitches themselves needed to be offered in varying configurations (full size adult pitch, half pitch for juniors and quarter pitches for minis) with differing charge rates for each. Each option needed to be available with repeat, regular bookings, allowing some formats to be booked in advance for the full playing season. Additional requirements included the ability to reserve and pay for various peripherals such as corner flags, nets etc.
- A large borough authority, whose boundary includes a substantial seaside town that attracts many seasonal visitors, runs an annual series of music concerts and events. Events vary in nature and the different venues have varying capacities. The council needs to offer ticketing for each individual event whilst also offering a 'series booking' option with a built in discount for those that want to attend multiple events, as well as to offer concessionary rates for student and older customers.
- A large city council wanted to digitise the process for the booking and payment of removal of bulky items from residents' households. In this example, the bookings process had to effectively interface with an already sophisticated waste process. The council concerned had introduced 'weighted' system whereby bulkier items - a bed base for example - attract a higher charge than less bulky and cumbersome items. There was also a six item limit for a single collection. Each booked and paid for collection then needed to be added to a collection route on a given day in an optimal geographical order. Ad hoc waste collections are extremely complex processes to manage.



Overview of our work with UK local authorities

Abavus's activities focus exclusively on UK local authorities, enabling each organisation we engage with to achieve wide-ranging transformation of service delivery across the full range of council functions. We work closely with our clients and have invested significantly in the development of the My Council Services digital platform to support processes that require the creation of a booking or appointment at some point in the process.

It is remarkable how many daily local authority processes require the making of a booking or reservation of varying descriptions. To date we have enabled bookings processes including a wide range of service areas:

- Waste
- Public protection
- Revenues and benefits
- Leisure services
- Internal processes such as room bookings

In the following sections of this white paper we examine how the My Council Services platform supports the following areas of bookings and appointments:

- Customer self-service – how councils can quickly and effectively enable customers to access the relevant bookings process and complete reservation or bookings entirely online using a device of their choosing.
- How councils can streamline the process of calculating and collecting the correct fee in return for the delivery of a service or product in situations where a booking process may also require payment collection e.g. for a paid bulky item collection
- Bookings management and configuration – enabling the council to take ownership and control of the process design and set up, including automated workflow to support downstream activities and outcomes. This can cover a range of booking and appointment scenarios.
- Mobile working – how councils can use technology to support improved efficiency when fulfilling appointments and bookings that take place away from a council office or premises e.g. premises inspections or household collection and delivery
- Reporting and analysis – the tools available to allow insight and analysis of bookings demand and the detail therein

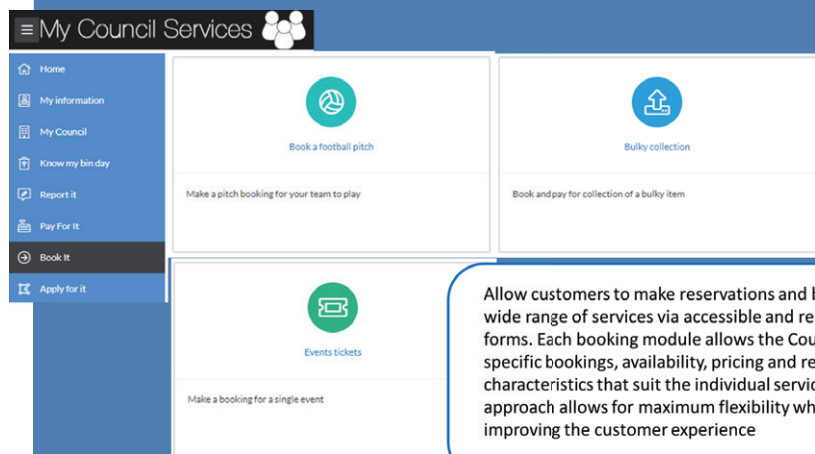
Customer self-service for bookings processes

The My Council Services platform incorporates a dedicated and fully integrated e-form design module. The My Council Services Bookings and Appointment module enhances the standard e-form functionality with a selection of plugins that enable a variety of bookings capabilities. This enables the entry point for customers requiring bookings for any of the following purposes:

- Bookings relating to a meeting room or other physical location
- Bookings and purchases relating to ticketed activities such as events or concerts
- Bookings relating to an appointment or consultation
- Bookings related to waste specific processes
- Bookings relating to assets e.g. sports facilities or other physical assets

The process of designing suitable and accessible forms is relatively straightforward. In addition to the option of creating new eforms from scratch, the My Council Services Form Store allows councils to share and borrow existing form templates with one another. Whilst the specifics of the processes can vary from one council to another, the overall requirements of the form are generally consistent. A new UK local authority wishing to deploy bookings and appointment forms need only to search, preview and import from the existing form templates in the platform's Form Store.

Once created and tested, forms can be quickly published and deployed as an individual form, as an integrated part of the council's web property (either requiring registration or not) and they can be made available as part of a fully functional customer portal.



Allow customers to make reservations and booking for a wide range of services via accessible and responsive e-forms. Each booking module allows the Council to configure specific bookings, availability, pricing and repeatability characteristics that suit the individual service scenario. This approach allows for maximum flexibility whilst also improving the customer experience

Service request and Case
Forms builder Add or edit your categories, questions and answers
Rules Add or edit rules, that create actions based on the different attributes on a Service request, Case and Task
Status Add or edit Service request or Case status
Transitions View or update status transition detail
Priority Add or edit Service request or Case priority
Outcomes View and update your service request / case outcome settings
Quick Response Create, edit and print QR Codes
Store View and consume existing forms from the store
Service level agreements View and manage the respond, plan and resolve by service timings
Settings View and update your report settings

The My Council Services Form Store allows Councils to create and then share booking & appointment forms. Sharing is voluntary but is extremely popular. This means that users community members can re-use form templates from already created and deployed by colleagues at other UK Local Authorities. Forms can be previewed and the detailed structure explored prior to importing a copy into you own Council's secure instance of My council Services

Store

Forms builder	Rules	Status	Transitions	Priority	Outcomes	Quick Response	Store	Service level agreements
Forms								
	Client	Form	Form preview					
<input type="checkbox"/>	My Monmouthshire	MOT Booking	Form preview					
<input type="checkbox"/>	Newport City Council	Appointments Booking	Form preview					
<input type="checkbox"/>	Southend on Sea Borough Council	Booking & Payment	Form preview					

Payment collection and product management as part of a booking or appointment process

A consistent theme of most My Council Services implementations is the need to offer integrated and secure online payment. This enables the council to fully streamline the process, ensuring that where a payment is required, the appropriate charge is collected. This supports the council's income collection and helps eliminate bad debt where services are delivered but never paid for.

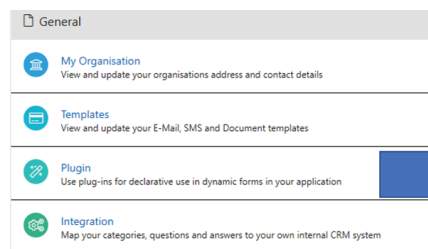
My Council Services also enables councils to create and maintain a products database. This could be anything from personal protective equipment inventory through to replacement bins for residential or trade customers. The product database means that pricing can be efficiently managed and maintained. Products can be created as physical items held in stock and they can be configured to represent service packages with associated pricing.

Products
Category Define and manage product category.
Access Define and manage owner role types.
Status Define and manage product status.
Transitions View or update lifecycle phases of products
Availability Define and manage product availability.
Availability status Define and manage product availability status.
Attributes Define and manage product attributes.
Level Define and manage product level.
Reason Define and manage product reason.
Stores Define and manage product stores.

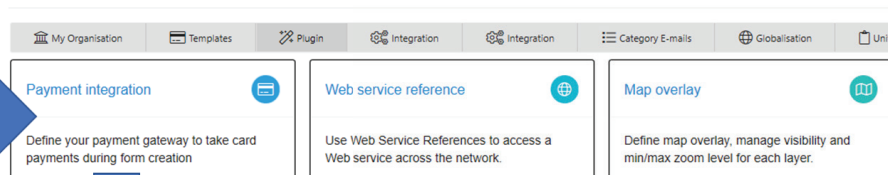
The My Council Services Product Management Modules allows Councils to create and manage the full range of products and services they offer. This enables efficient price and inventory management where this is required. Products can be configured as part of a booking process, where this makes sense to do so. The combination of bookings and products add a further dimension to the possibilities for digital processes...

Code	Name	Description
<input checked="" type="checkbox"/> TR	Work trousers	Durable protective trousers
<input type="checkbox"/> HVJ	Hi visibility jacket	Waterproof high visibility long jacket
<input type="checkbox"/> SGL	Safety glasses	Clear perspex safety glasses
<input type="checkbox"/> WKBT5 10	Work boots UK 10	Steel toe capped safety boots UK 10
<input type="checkbox"/> WKBT5 9	Work boots UK 9	Steel toe capped safety boots UK 9
<input type="checkbox"/> WKBT5 8	Work boots UK 8	Steel toe capped safety boots UK 8
<input type="checkbox"/> WKBT5 7	Work boots UK 7	Steel toe capped safety boots UK 7
<input type="checkbox"/> WKBT5 6	Work boots UK 6	Steel toe capped safety boots UK 6
<input type="checkbox"/> GLVS	Gloves	Safety work gloves one size

The My Council Services digital platform is routinely integrated with councils' preferred payment gateway providers to enable the online collection of fees as part of the self-service process. Once integrated, the payment capability exists on the platform as a re-usable and configurable plugin. This means that, once it is in place, the same plugin can be used for multiple booking and appointment transactions (and more widely for another form or service type).



Plugin



Calculating, collecting and tracking of payments related to the booking of a service is an important element of the process. My Council Services enables integrated online payments with the ability to track and reconcile all transactions as part of the bookings management process.

Payment gateway

Edit		Payment gateway	Name	Description	Enabled
		Capita Payment Gateway			Yes
		CIVICA Payment Gateway			Yes
		WorldPay Payment Gateway			Yes
		Barclaycard Payment Gateway	Barclaycard		Yes
		GoCardLess - Redirect flow	GoCardLess - Redirect flow		Yes

Bookings configuration and management

As already discussed, UK councils are responsible for a wide range of service types that require some form of booking, appointment or reservation. These can be customer-facing processes (booking an appointment with an advisor) or they can be internal process (reserving a meeting room).

It is sensible that the council sets itself up to be equipped to manage the full array of processes. An important element of this is the ability to self-configure booking processes internally without necessarily needing to revert to the vendor. This can be either be the creation of a new digital booking process or it can be the modification of a process that is already deployed and being used. The ability to update and modify the way a booking process is deployed can be in response to multiple factors:

- User feedback that has identified improvements that can be made to an online process and the customer experience
- A legislative change that impacts the way the booking process needs to be configured
- A change to resources or assets that affects the detail of a booking or appointment process

Therefore it is important that council staff are able to design bookings processes and workflow to meet the specific requirements of their organisation. Moreover, it makes sense that staff can also manage and update the detailed configuration options that underpin a bookings process. My Council Services has been designed and engineered to be fully configurable and, wherever possible, configuration is via an intuitive

graphical user interface with no complex scripting or coding required. This approach also allows the business owner, who understands the practicalities of a process and how a customer will be able to navigate it, to be directly involved in its design, configuration and deployment. Having control of the core configuration aspects enables the council to iterate and refine its processes with minimal overhead.

Bookings and appointments		
	Status	Define and manage booking facility status
	Transitions	Define and manage booking facility status transition
	Items	Define and manage booking facilities
	Layouts	Manage room layouts and setup
	Waiting list	Manage waiting list and people
	Cancellation	Booking cancellation reason
	Waste items	Manage waste items for booking

Status		
Edit	Status	Type
	Booking	Booked
	Available	Available
	Did not attend	No attendance
	Confirmed	Confirmed
	Cancellation	Cancel

Items	
Edit	Name
	Canyon Park Recreation Football pitch 1
	Canyon Park Recreation Football pitch 2
	Ribble Recreation Ground Football pitch 1
	Ribble Recreation Ground Football pitch 2

The suite of Bookings and Appointments modules as part of the My Council Services platform enables the council to take full ownership of the design, configuration and deployment processes.

Whilst bookings processes include some complexity, the interfaces for configuration are graphical user interfaces which are accessible and intuitive for non-technical users.

Enabling mobile and remote working with bookings and appointment processes

Many bookings processes require a service action or delivery that takes place away from council premises. A prime example is providing the ability for a customer to book (and perhaps pay for) the removal of a bulky item. This is a service that almost all councils provide and many charge for.

Provision of this service requires a council officer or other representative to visit a location using a vehicle and potentially other appropriate equipment to complete the uplift. Multiple collections will be ordered and paid for by customers each day. Each needs to be added to a daily route and, depending on volume and density of collections, it may make sense to optimise the collection route. As a minimum, the crew completing collections should be equipped with a ruggedised tablet device, either cab-mounted or handheld, on which they can view their daily task list and all the requisite details. It is also helpful to have this integrated with satellite navigation guidance to support efficient working.

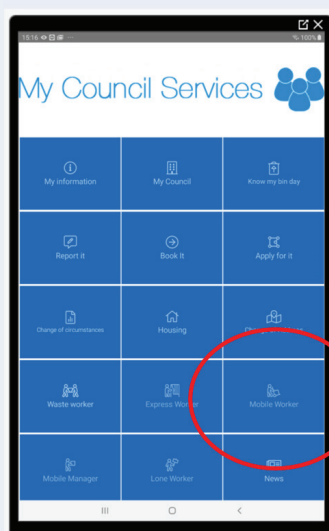
At first glance, this deployment of a process that began its journey as a booking and payment activity then segued to a mobile working and waste services activity, may not seem essential. However, without the ability to create a multi-step seamless process, the efficiencies gained through self-service booking can easily leak away. Efficiency gains are quickly lost as soon as manual intervention and potentially double keying of data into other systems is required, so fully integrated technology solutions are vital. Furthermore, an end-to-end digital process like the one described is not only better for the council's efficiency and effective use of resources, but it also delivers a superior experience for the customer.

In this service context it is most efficient to be able to equip the council's representatives with a mobile device on which

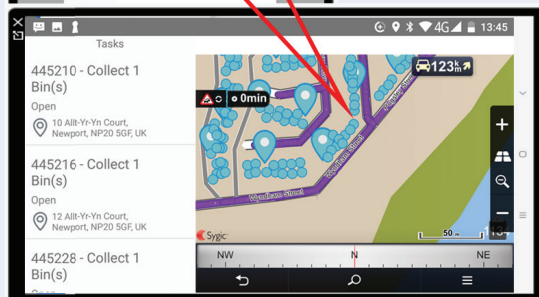
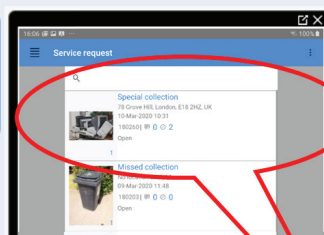
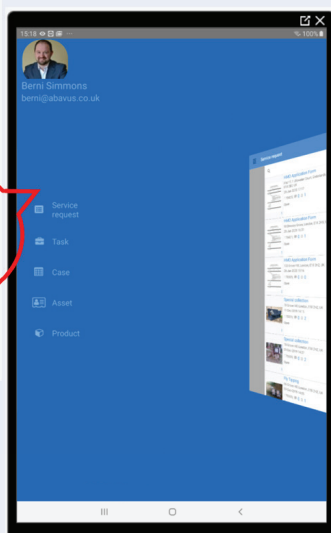
all the relevant initial booking data is available. This removes the need for paper forms and allows for the eradication of double keying of data (e.g. first manually captured on paper followed by data entry into a separate back office system).

A further important consideration is offline working capability - enabling a mobile officer to access booking and task data, add to it and save it, regardless of mobile carrier or wireless signal. This is generally best achieved through a locally installed native mobile app on the smartphone or tablet. Any locally held data must be securely encrypted and should be wiped once a task or booking service is complete and successfully synchronised to the back office. The native mobile application approach that is used by My Council Services has numerous benefits over browser based approaches, specifically:

- **The ability to securely encrypt locally held data and manage its removal as part of the workflow once it is no longer required**
- **Offering better overall security than other approaches e.g. avoiding the potential security risks associated with caching data in browsers on local devices**
- **Perhaps most importantly the ability to enable true offline working meaning that your remote officers can remain productive regardless of carrier signal or Wi Fi availability**



Mobile Working provides a fully integrated and device independent platform for remote delivery of booked services, accessible via tablet



Mobile Working can utilise the fully integrated My Council Services route planning, guidance & optimization capabilities to create a truly end to end digital service capability

Accurate appointments and booking data available for real time reporting

Councils need up to date and easy to access data on the level of activities and volume of bookings, in order that useful resource planning can be completed. Because of the range of bookings and appointments processes that exist across a council, it is important for reporting to be possible across a range of criteria, for example:-

1. To select and report by specific process or form type and service area
2. To produce reports that are tabular, graphical or spatial in nature
3. To create custom bookings reports that show granular detail on the nature of bookings and appointments being made by customers

Combining these reporting capabilities provides councils with a meaningful view of the demands being made across the

organisation. Multiple colleagues across a range of service areas need access to this reporting capability and it is most effective if each user is able to configure and run the range of reports that their service area requires.

My Council Services provides councils with a range of integrated options in terms of reporting. From realtime reporting on inbound bookings and appointments being requested and made, through to detailed reporting on payment status by booking type where this is applicable; councils can quickly and easily configure reports that summarise and list the required detail to support effective management and governance.

	Number	Form	Date	Status	Impact	Service	Priority	Customer
	181778	The Civic Centre Redbridge	Today, 10:10		-	-	-	Mrs. Vanessa Wilcox
	181777	The Civic Centre Redbridge	Today, 10:04		-	-	-	Mr. Graham Wilcox
	181776	Ilford Drop In Centre	Today, 10:02		-	-	-	Mrs. Sally Wilcox
	181775	Ilford Drop In Centre	Today, 10:00					
	181379	The Civic Centre Redbridge	08 Apr 20 13:21					

Integrated and configurable report generation based on up to date bookings data provides accurate and usable information for management reporting whilst providing guidance that will support and focus resource planning activities for the Council

The My Council Services platform has an API, allowing councils to connect data to an external business intelligence products such as Power BI.

Overall, effective reporting makes it easier for organisations to see patterns of demand in bookings and appointment requests. Analysis and reporting on the specific detail of a booking - for example, what a client wants to discuss in a meeting (assistance

with housing, guidance on benefits claims etc) - helps better planning and service design and supports more efficient use of council resources.



About Abavus

Abavus is an established UK-based technology and service provider to the UK public sector. Since 2007 we have been delivering software solutions and consultancy services that underpin and enable transformation and efficiency programmes in local authorities.

At Abavus we work extremely closely with one innovative, independent software house – iTouch Vision – who develop the widely used My Council Services enterprise platform. Abavus and iTouch Vision have entered into a long-term partnership agreement, whereby Abavus implements and supports My Council Services exclusively in the UK public sector.

This allows iTouch Vision to invest the maximum resource in its continued research and development activities, whilst Abavus focuses on the delivery and support of the solutions to clients.

Abavus has a customer base of over 50 UK local authorities and government organisations using the My Council Services solutions, as well as a small number of private clients. We are firmly established in the public sector market as a leading provider of innovative, cost-effective information technology solutions, helping public and third sector organisations to save money and make significant efficiency gains.

Abavus has been successfully delivering technology-enabled transformation projects in the testing operating environment that has prevailed following the financial crash of 2007 and the unyielding constraint on funding that this has created. Whilst this has been challenging it has meant we have to keep our projects focused on value and delivery. Our responsive, customer-focused approach has enabled us to thrive in a busy marketplace.

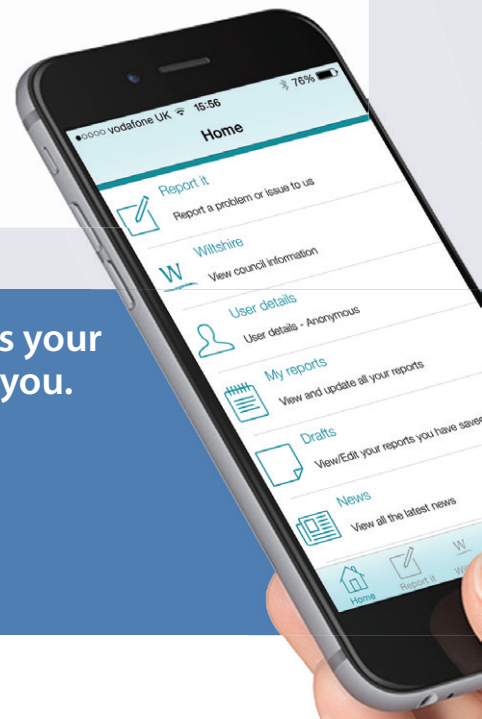
Consultancy and training

Abavus also provides consulting and training services to ensure that our clients are up and running with the technology solutions we provide as quickly and efficiently as possible.

Drawing upon our extensive knowledge and understanding of public sector organisations and the specialist technical skills within the team, Abavus leads and supports consultancy and training engagements with the focus on driving business transformation and change.



myCouncilservices



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