

## 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

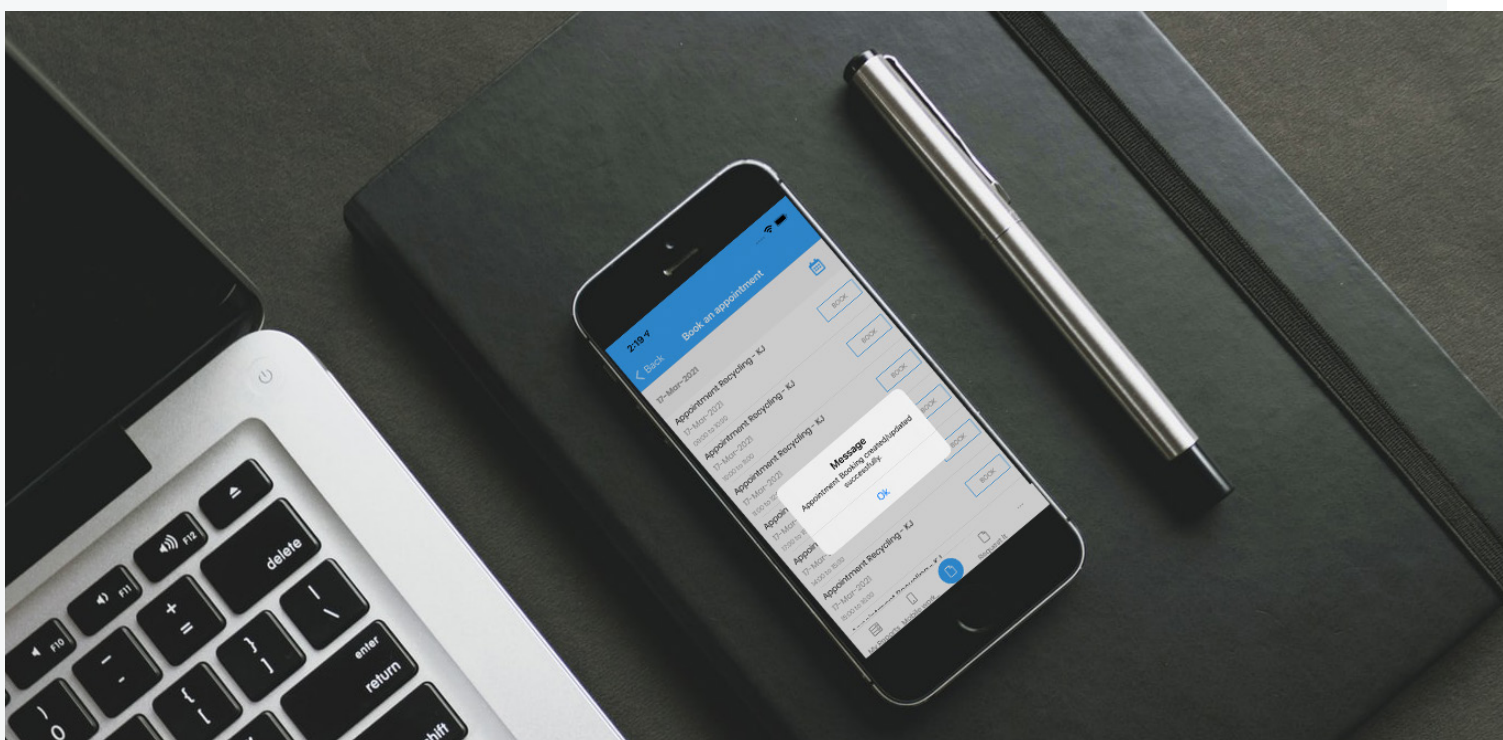
Abavus's activities focus exclusively on UK local authorities, enabling each organisation we engage with to achieve wide-ranging transformation of service delivery across the full range of council functions. We work closely with our clients and have invested significantly in the development of the My 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.

Make a Booking			
Search			
<p><b>Bulky Waste Booking Form</b></p> <p>Book an appointment for Bulky Waste</p>	<p><b>Pest Control</b></p> <p>Book an appointment for pest control</p>	<p><b>Room Booking</b></p> <p>Book an appointment for a specific room</p>	<p><b>Events Booking</b></p> <p>Make a booking for an event</p>
<p><b>Sports Pitch Booking</b></p> <p>Book a reservation for a sports pitch</p>	<p><b>HWRC Booking</b></p> <p>Book an appointment for Household Waste and Recycling C...</p>	<p><b>Concert Series</b></p> <p>Make a concert booking (full event package)</p>	<p><b>Library Appointment</b></p> <p>Book a library appointment</p>

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

Administration \

Store

Forms builder

Rules

Status

Transitions

Priority

Outcomes

Quick Response

Store

Service level agreements

Translate

Settings

Search forms

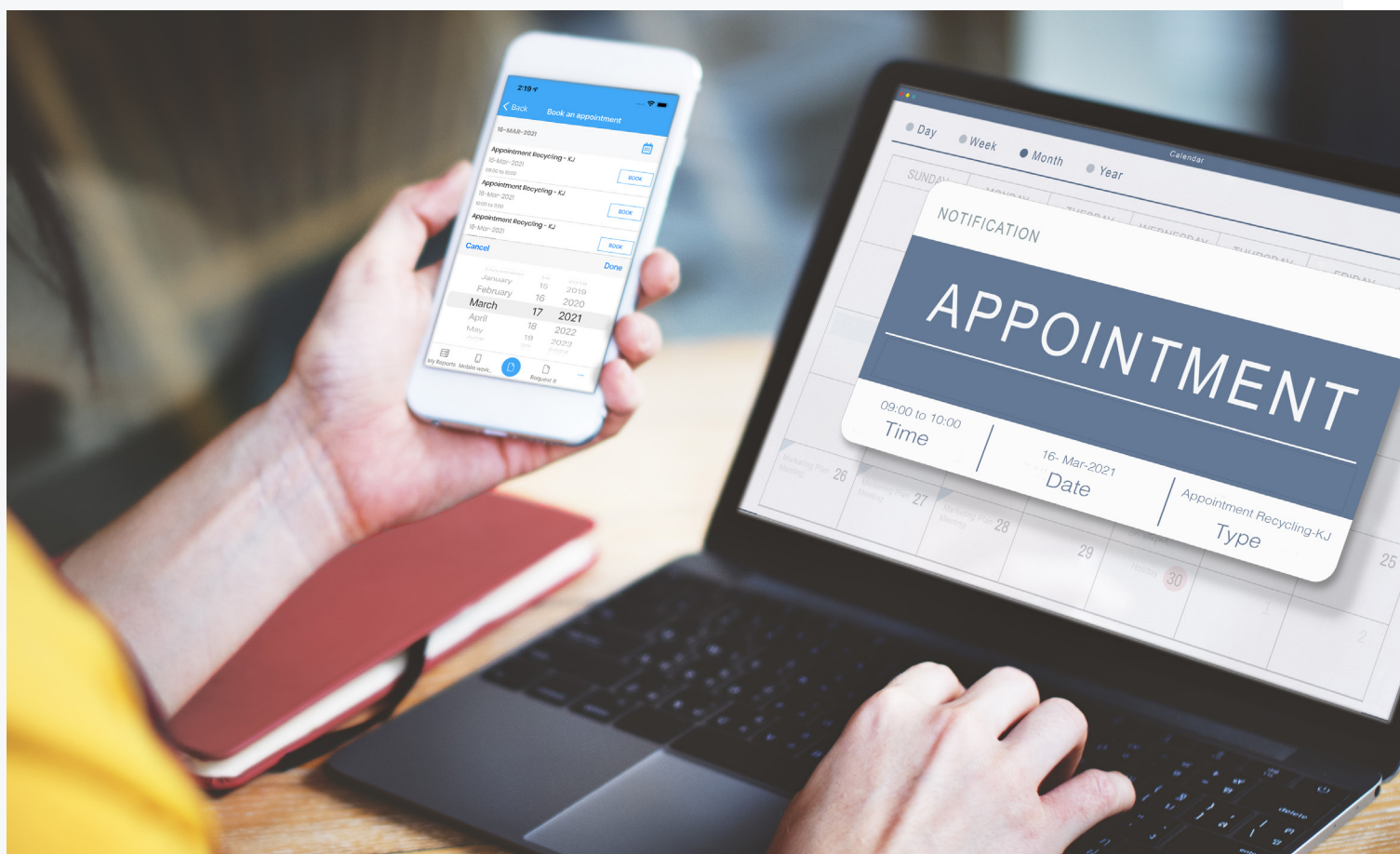
Search

Forms

Import

	Client	Form	Form	Tree	Rating	Reviews	Download
<input type="checkbox"/>	AU - My Council Services	Car Park Maintenance			★★★★★	1	3
<input type="checkbox"/>	AU - My Council Services	Dog Fouling			★★★★★	1	2
<input type="checkbox"/>	AU - My Council Services	Drain Problem			★★★★★	1	1
<input type="checkbox"/>	AU - My Council Services	Fly Poster			★★★★★	1	0
<input type="checkbox"/>	AU - My Council Services	Food Hygiene			★★★★★	1	1
<input type="checkbox"/>	AU - My Council Services	Health and Safety			★★★★★	1	0
<input type="checkbox"/>	AU - My Council Services	Missed Bin Collection			★★★★★	1	0
<input type="checkbox"/>	Your Winchester	Garden waste bags new or replacement - Copy			★★★★★	1	1
<input type="checkbox"/>	Your Winchester	Missed Bin Collection			★★★★★	1	0

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





# 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 availability.

Availability status

Define and manage the status of the availability.

Attributes

Define and manage further product attributes.

Level

Define and manage category level(s).

Administration \

Category

Category

Access

Status

Transitions

Availability

Availability status

Attributes

Level

Reason

Stores

Settings

Category

Edit	Category	Code	Description	Enabled
	Appointment Product	APPOINTMENT_PRODUCT_2543_C		Yes
	Appointment Type	APPOINTMENT_TYPE_424_B		Yes
	BLUE_BADGE_APPLICATIONS	BLUE_BADGE_APPLICATIONS_820_C		Yes
	Bulky Item Collection	BULKY_ITEM_COLLECTION_100_C		Yes
	HWRC Product Category	HWRC_PRODUCT_CATEGORY_100_C		Yes
	Jack Appointment Product Category	JACK_APPOINTMENT_PRODUCT_2536_C		Yes
	Jack HWRC Product Category	JACK_HWRC_PRODUCT_CATEGORY_100_C		Yes
	Licences	LICENCES_100_C		Yes
	Payment Integration	PAYMENT_INTEGRATION_2300_C		Yes
	Residential parking permit	RESIDENTIAL_PARKING_PERMIT_100_C		Yes
	T1	T1_100_C		Yes
	Waste	WASTE_952_C		Yes
	Waste movement	WASTE_MOVEMENT_2537_C		Yes

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....

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).

General

My Organisation

View and update your organisations address and contact details

Templates

View and update your E-Mail, SMS and Document templates

Plugin

Use plug-ins for declarative use in dynamic forms in your application

Integration

Map your categories, questions and answers to your own internal CRM system

Integration

Map your categories, questions and answers to your own internal CRM system

Category E-mails

Define service request recipients by category

Globalisation

View and update your globalisation settings

Administration \

Plugin

My Organisation

Templates

Plugin

Integration

Integration

Category E-mails

Globalisation

Unit

Settings

Checklist

Local tax legislation

Types

Google analytics

Payment integration

Define your payment gateway to take card payments during form creation

Web service reference

Use Web Service References to access a Web service across the network.

Map overlay

Define map overlay, manage visibility and min/max zoom level for each layer.

Repeater fields

Add or edit repeater field for dynamic forms.

Payment gateways

Edit	Payment gateway	Name	Description	Enabled
	GOV.UK Pay Payment Gateway	GOV.UK Pay		Yes
	CIVICA eStore Payment Gateway	Civica e-Store		Yes
	CIVICA eStore payment integration	GOV.UK eStore payment		Yes
	CAPITA CIVICA	Capita Pay		Yes
	CIVICA	CIVICA		Yes
	WorldPay	WorldPay		Yes
	Barclaycard	Barclaycard		Yes
	GoCardless	GoCardless		Yes

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.

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# 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.

**Administration \ Booking status**

Navigation: Status | Transitions | Items | Layouts | Waiting list | Cancellation | Waste items

**Status Configuration Table:**

Edit	Status	Type	Code	Color code	Indicator icon	Font color	Background color	Start	End	Enabled
	Initial (Available)	Available	INITIAL_(AVAILABLE)_4241_S					-	-	Yes
	Cancel (Cancel)	Cancel	CANCEL_(CANCEL)_4242_S					-	-	Yes
	Reserved (Provisional)	Provisionally Booked	RESERVED_(PROVISIONAL)_4243_S					-	-	Yes
	Confirmed Booked	Booked	CONFIRMED_(BOOKED)_4244_S					-	-	Yes

**Items Configuration Table:**

Edit	Name	Parent	Type	Description	Enabled
	Adult Football Pitch 1-5	-	Asset	-	Yes
	Blue Badge	-	Asset	Test	No
	Test Booking Facility	-	Asset	Done	Yes
	Ilford County High School	-	Asset	-	Yes
	Adult Football Pitch 1-5	-	Asset	-	Yes
	Assets Booking Facility	-	Asset	-	Yes
	Test booking football	-	Asset	-	Yes
	Barkside Play Area	-	Asset	-	Yes
	Domestic Collections Service	-	Asset	-	Yes
	Adult Football Pitch 1-5	-	Asset	-	Yes

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 booking 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.

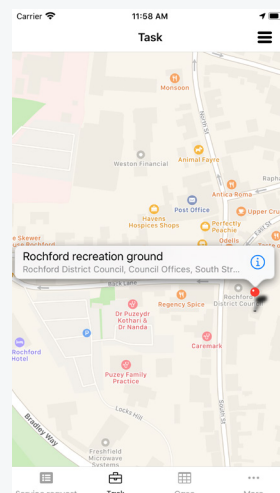
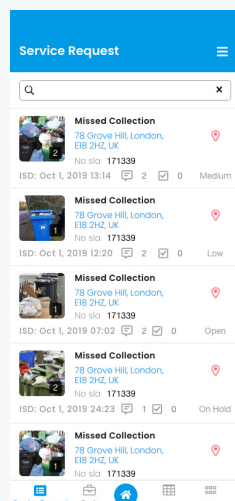
In this service context it is most efficient to be able to equip the council's representatives with a mobile device on which all the relevant initial booking data is available. This removes the need for paper forms and allows for the eradication of double keying of data (e.g. first manually captured 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 book services, accessible via tablet



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

# Accurate appointments and booking data available for real time reporting

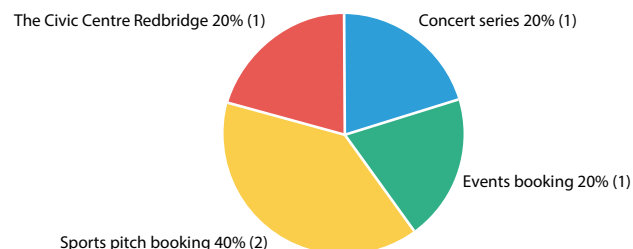
Councils need up to date and easy to access data on the level of activities and volume of bookings, in order that useful resource planning can be completed. Because of the range of bookings and appointments processes that exist across a council, it is important for reporting to be possible across a range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

<div> <input type="text" value="Number"/> <span>Options</span> <span>Action</span> <span>Add</span> </div>											
	Number	Form	Date	Status	Impact	Service	Priority	Customer	Owner	Location	Risk
	<a href="#">195343</a>	Special collection	11 Feb 21 12:16		-	-	-	<a href="#">Mr Jake Test</a>	Mr. Berni Simmons	78 Grove Hill, London, E18 2HZ, UK	-
	<a href="#">195332</a>	Special collection	11 Feb 21 10:14		-	-	-	<a href="#">Mr Jake Test</a>	Mr. Berni Simmons	78 Grove Hill, London, E18 2HZ, UK	-
	<a href="#">195311</a>	Special collection	10 Feb 21 15:57		-	-	-				
	<a href="#">195074</a>	Special collection	05 Feb 21 11:58		-	-	-				
	<a href="#">195048</a>	Special collection	05 Feb 21 09:34		-	-	-				



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 Ltd and My Council Services

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 – iTouchVision – who develop the widely used My Council Services enterprise platform. Abavus and iTouchVision have entered into a long-term partnership agreement, whereby Abavus implements and supports My Council Services exclusively in the UK public sector. This allows iTouchVision 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.

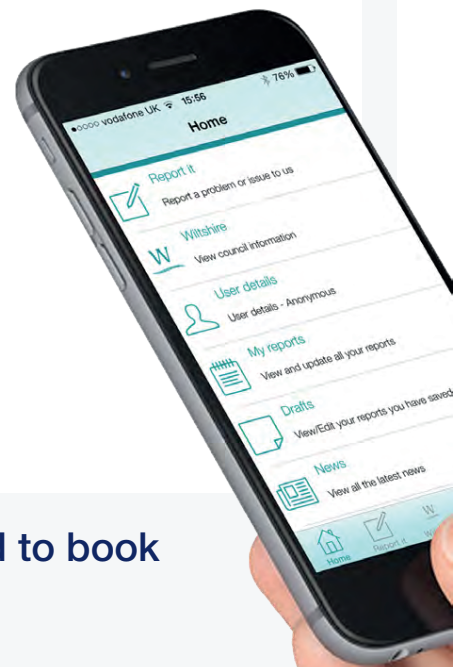
### Consultancy and training

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**



**For more information about My Council Services and to book your free demo, contact us below:**



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