



# Contact Management Tailored Modules Web-enabled

## Citizens Advice – Delivering Effective Advice

The Citizens Advice Bureau (CAB) Service is an independent charity founded in 1939 with twin aims. It works to ensure that individuals do not suffer through lack of knowledge of their rights and responsibilities or of the services available to them, or through an inability to express their needs effectively. Equally, the service works to exercise a responsible influence on the development of social policies both locally and nationally.

Every Citizens Advice Bureau is an independent, registered charity reliant on volunteers and on funding from the local authority, local businesses, charitable trusts and individual donations. Each bureau is a member of Citizens Advice, but is run independently. Every year, Citizens Advice Bureaux help to solve nearly six million new problems, which are central to people's lives.

### FAST FACTS

- case study: **Citizens Advice**
- location: **Nationwide (England and Wales)**
- users: **Over 250**
- database: **SQL Server**
- integration: **Sun Finance Systems, HR, CASE and  
Citizens Advice's Extranet and  
websites**

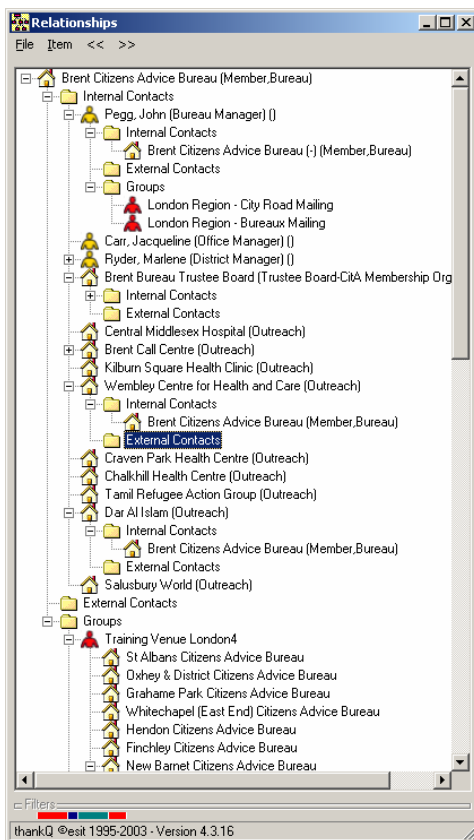
### the original system

Citizens Advice had a Contact Management System (CMS) in place before the Resource Directory project was implemented, but it had experienced problems and the database was not being as widely used as expected. The data was mapped and migrated from the CMS into the Resource Directory. Data from various other systems was also migrated into the Resource Directory before the project was rolled out.

### the new system

The Resource Directory now acts as the central source of information for Citizens Advice in order to assist with its work and relationships with bureaux throughout England and Wales. The Directory is built around the contact management functionality of thankQ and is supplemented by a number of modules, in key areas:

- ◆ Helplines
- ◆ Audit
- ◆ Visits
- ◆ Events
- ◆ Fundraising
- ◆ Subscriptions
- ◆ Web Portal
- ◆ GIS Module
- ◆ Specialist Support Unit (SSU)
- ◆ Social Policy
- ◆ Finance



The Resource Directory's Relationship Manager

### case study: Citizens Advice



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**Helplines Module** - enables Citizens Advice to log queries from bureaux and then use them as a knowledge base for future queries.

**Audit Module** - allows Citizens Advice to evaluate the quality and consistency of the service offered by the bureaux, includes ability for automatic notification of actions.

**Visits Module** - manages and records the visits made to bureaux by Citizens Advice staff and updates the Outlook calendars of those involved in visits. A global calendar is also kept up to date to show all visits being made on a particular day.

**Events Module** - is used to manage and organise the events that Citizens Advice run. The module links to the financial system and invoices are produced automatically.

**Fundraising Module** – is used to manage income from fundraising by individuals and corporate organisations.

**Subscriptions Module** - manages the subscriptions of magazines and other products that are provided by Citizens Advice to bureaux and other external organisations.

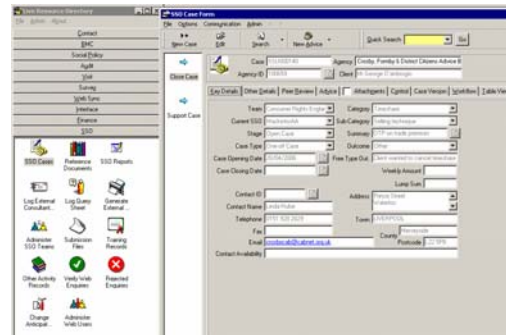
**Web Portal Module** - allows Citizens Advice staff to search for details of bureaux and other staff; and allows bureaux to edit and update their own details through a secure web interface.

**GIS Module** – used for spatial analysis of Citizens Advice Bureaux services.

**SSU Module** – allows bureaux to log consultancy enquiries and SSU team to respond via a web interface.

**Social Policy Module** - is used to manage and record the Social Policy involvement of each bureau, including evidence submitted and parliamentary relationships.

**Finance Module** – is used to manage and record the financial status of each bureau.



SSU interface

The Resource Directory is used at Citizens Advice Head Office in London and regional offices throughout the country. Access to the system is provided by thin client (Windows Terminal Services).

Bureaux have web access, which allows them to maintain their own information and view that of other bureaux. This part of the project is delivered using webMIT, a web-based interface that links to a snapshot of the Resource Directory database. This snapshot of the database is synchronised daily with the live database.

As part of the project, ESIT took measures to ensure that its software meets current accessibility standards as defined by W3C.

## the benefits

The Resource Directory provides Citizens Advice with:

- ◆ A central source of information that will help to maintain its relationships with bureaux and other related organisations.
- ◆ The ability to manage its business processes more effectively and efficiently, saving time and money.
- ◆ To monitor and track the quality of advice being provided to the public, to improve the level and consistency of service.
- ◆ To record and analyse all support calls from bureaux, across the country, to allow Citizens Advice to react quickly to new or increasingly common enquiries and to deploy relevant resources in a timely and effective manner.

## case study: Citizens Advice