

# SUPPORTING PEOPLE

How adding Virtual Workers to a Social Care team improves front-line service delivery

# "RPA isn't about monetary gain for us. Our strategy is focussed on improving services for people in need."

Codebase[8] worked with Caerphilly Council to deploy Intelligent Automation across their front line social care services.

At first glance, social care isn't an obvious candidate for intelligent automation. It's a profession that relies on empathy and emotional – rather than artificial – intelligence, to help people through complex situations and protect those at risk.

However delivering care takes time: not only in face-to-face consultations with service users, but also in calls to other service providers and sources of support. These are the areas where social workers excel. Yet with a growing caseload and an increasing volume of administrative tasks to complete, the Supporting People team at Caerphilly Council were finding that the time its members could dedicate to front-line care was being squeezed.

Having seen how process automation had freed up staff time in other areas of the Council's work, senior managers were keen to explore how the same approach could be introduced to social care.

Before any steps could be taken towards introducing automation, the care workers themselves had to understand the benefits of how intelligent virtual workers could make a real difference to the team's everyday role.

That's where Codebase[8] were introduced.

To explain and explore the benefits of automation Codebase[8] ran a series of workshops with the Supporting People team at Caerphilly Council. The workshops very quickly helped show that automation was not a threat to the team or its preferred ways of working. Over the course of a week, 100 suitable candidates for automation were identified and quantified.

The core of Caerphilly's strategy was that automation wasn't about monetary gains: instead, the focus was on improving services for people in need. On that basis, the first area chosen for automation was the management of new referrals to the social care team.

"I can honestly say that before engaging with Codebase[8] our Automation journey started with a bumpy ride, we knew the value automation could bring but we struggled to quantify the benefits.

Codebase[8] has reinstated our confidence in automation and really understood our strategy. Collaboratively we have delivered tangible results in a short period of time and during the pandemic. I am immensely proud of our team's achievements to date and the immediate future."

LIZ LUCAS - HEAD OF CUSTOMER AND DIGITAL SERVICES



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# Virtual workers have given us time back and enabled us to focus on supporting people

Case referrals are crucial to ensure some of the most vulnerable people from within the community have access to the vital support the team can provide. Virtual workers can now handle this for us with speed and with accuracy, giving us valuable hours back to focus on delivering care.

The Supporting People team receives referrals of potential new cases from a range of sources: schools, GPs, midwives, the police and a range of third sector organisations. The referrals are typically of people in crisis or at risk, for any number of reasons – and they typically contain some, but not all the information the team need.

Historically, the arrival of a new referral would trigger a number of activities. A member of the team would check details across a range of databases, to see if the person referred was already known to services; as well as confirming personal contact details, they would look for records of things such as learning difficulties or mental health issues, history of debt or addiction. This process took time and was heavily reliant on the staff to complete it accurately.

Because the process was rules-based, Codebase[8] identified this as a simple task for the Blue Prism Cloud Virtual Workers to quickly prove the value of Intelligent Automation.

Working closely with members of the Supporting People team, Codebase[8] identified the precise steps involved and the potential problem areas – such as incomplete data. Based on their findings, Codebase[8] was able to develop an automated process where referrals are received digitally and a 'virtual worker' takes on the task of completing the case details.

"The Caerphilly Supporting People team are looking forward to the benefits that automation will continue to bring to our daily tasks and moving the Team forward. Not only for the wellbeing of our staff, but also for the vulnerable residents within the Borough; ensuring support is provided as soon as possible. Automation provides the added benefit to ensure our providers' invoices are paid promptly and accurately.

It's amazing what can be accomplished by working together. The benefits we have achieved across various teams encompassing Digital Services, Codebase[8], Supporting People and #TeamCaerphilly we have been able to support a larger number of vulnerable people across the Caerphilly County Borough and moving forward this will further increase."

SHELLY JONES - SUPPORTING PEOPLE MANAGER

## The results



New cases are ready for the team to assess and action immediately without the need for searching & manually updating records



A vital 10 minutes per referral has been given back to the team resulting in a significant referral increase forecast



The extra time means we can help even more people in the community with many aspects of their lives; including Housing, Debt, Employment and Covid-19 enquiries

3,120

TOTAL WORKING HOURS  
SAVED PER YEAR

60 hrs

TOTAL WORKING  
HOURS SAVED PER  
WEEK

▲ £64k

TOTAL RETURN ON  
INVESTMENT PER YEAR



# Using AI to intelligently extract and process large volumes of supplier invoices

Intelligent Automation has reclaimed approximately 50 hours of care workers' time each week to spend on front-line tasks – equivalent to 2,600 hours a year. Crucially, it's relieved staff from performing tasks they enjoyed least. From the supplier perspective, we can now deliver faster payments and fewer errors.

The second area selected for automation was payment processing. The team works with over 40 partners that provide care and assistance to Caerphilly residents, and all 40 regularly invoice. Prompt, accurate payment is clearly essential to maintaining these pivotal relationships – but processing the invoices and matching up to 200 separate payments to the services delivered was a dull and time-consuming task. Most importantly, it was not a good use of skilled social workers' time.

With Codebase[8]'s assistance, the process is now fully automated. A virtual worker completes the necessary data entry and matches payments to services and providers; the only manual task is a sense-check for validation before payment.

"We've essentially been given an intelligent virtual admin assistant to do all of the data analysis and data entry for the team. This has enabled us to hit deadlines and focus on what really matters; helping those within our community who need it most. We often receive referrals that are extremely time sensitive so every minute counts, and this technology has given us that vital time back."

TIFFENY DAVIES -  
PROJECT OFFICER (PEOPLE SERVICES)

## The results



Automating the invoice process has taken the onus off the Supporting People Team, who historically had to key in the details of the all invoices



Now the only human intervention needed is a sense check



Thanks to the implementation of this virtual worker, the team have been freed up to concentrate on supporting the most vulnerable in our community.



Streamlined process for paying suppliers

2,600

TOTAL WORKING HOURS  
SAVED PER YEAR

50 hrs

TOTAL WORKING  
HOURS SAVED PER  
WEEK

▲ £74k

TOTAL RETURN ON  
INVESTMENT PER YEAR



# Delivering value, at pace, under exceptional circumstances

The COVID-19 pandemic has highlighted the importance of the role of automation in public service delivery. Caerphilly has further proved that human and digital labour can co-exist in harmony, to the benefit of society, at a time when people needed it the most.

These two areas are just the start. Already, Codebase[8] and Caerphilly Council have automated two further processes plus an Intelligent Chatbot which moves beyond the basic capabilities of RPA. The Chatbot helps the public navigate their way to the right information, quickly.

With the new solutions going live against the backdrop of the COVID-19 pandemic, Caerphilly are proud of what is a substantial achievement given the restrictions on normal working practices.

The benefits of these have yet to be fully calculated, but the two more established processes are providing a substantial return on investment and continue to deliver service improvement.

## Achieving substantial return on investment

As well as releasing a combined total of 5,720 hours a year – the equivalent of at least 3 full-time employees – the two initiatives are calculated at delivering an annual return on investment of £138k (£64k for referral management, £74k for invoice processing).

That's despite financial ROI not being a key aim of the initiatives. Now Caerphilly is looking to offer its experience to other local authorities in Wales, as part of supporting the "Once for Wales" strategy.

"Caerphilly are a leading example of what can be achieved with Intelligent Automation with the right adoption, strategy and mindset to embrace change. I am exceptionally proud to witness the team's response to the Covid-19 situation - delivering a series of time critical projects in quick succession to meet the pandemic head on.

I see this case study being the start of redefining public service delivery in Wales as we continue to reinvest our good work into neighbouring authorities and Welsh Government.

A special thanks to Jason Miles [Digital Services Project Lead] and Karen Williams [Digital Hub Manager] at Caerphilly Council for their proactive support during the delivery of this project and to our partners Blue Prism Cloud and Microsoft for their extended support."

CRAIG JOHN - TECHNICAL DIRECTOR, CODEBASE[8]



GET IN TOUCH

# Contact us

Codebase[8] are Digital Innovation specialists, and the leading AI and RPA implementation partner of Blue Prism Cloud.

If you would like to know more, please get in touch below

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