

CASE STUDY | NON-PROFIT ORGANISATION

Enabling Sustainable Employment Through Advanced Technology

An innovative technology platform empowers advisors and customers, harnessing the power of data analysis to meet customer needs and enhance employment outcomes.

Our customer is a non-profit organisation that focuses on improving people's economic well-being, health, employment, education, and training. It provides services on behalf of governments and local authorities. Its mission is to put people at the centre of everything it does, inspiring confidence to believe in themselves.

The organisation won a contract to deliver the Restart Scheme initiative to the UK's Department for Work and Pensions (DWP). The DWP had specific service requirements for the employability services contract, with a goal of getting people back to work. It was essential to improve its systems and invest in technology, innovation, and training to meet these contractual requirements. While the existing CRM system could handle some aspects of the work, a new approach was needed to deliver more advanced pieces. Forge Technologies was tasked with planning and designing the technology.



Telephone and Contact
Centre Handling



Public-Facing Job Search Hub
and Customer Portal



Internal Advisor Case
Management System



Reporting Modules



Survey Capabilities



Financial Calculators



The Challenge

What sets this engagement apart is the desire to be intelligent and data-driven in responding to customers' needs. It is no longer enough to simply hope that a customer will find a job at the end of their journey. Success requires a new level of innovation to best engage with today's customers, who are often younger, digitally savvy individuals who have been unable to enter the workforce despite their technological capabilities.

To address this, we wanted to make digital technology central to the delivery model. This was achieved by implementing technology platforms that provide a high level of engagement for both the advisers who support the customers and the customers themselves. Best-of-breed technology platforms gather and analyse data, which is then used to respond intelligently to customer needs and recommend the next best action to reach employment faster and better.



The Journey

We embarked on a journey with the non-profit organisation, delivering parts of the solution as they mobilised the employment services contract and extended their service. Our first step was to implement appointment booking capabilities into the job centres. When job seekers visit the job centre, they are assessed by the work coach for their suitability for the restart program. The coach then refers them to the program online, and an appointment is booked. As we progress through the customer journey, we have visibility of every step.

Using Microsoft Bookings on the Azure platform, we can determine the best advisor within the organisation to conduct an initial qualification call. The job centre and an Engagement Coordinator work together with the potential candidate for the structured call online, typically using either Teams or a contact centre recording capability. If the candidate is deemed appropriate for the program, they proceed with the qualification process.

The booking process for the first appointment involves a set of structured steps captured through a combination of portals, a contact centre integrated into the environment, and a back-end database storage that we implemented for the organisation.





DWP will enrol the participant in the program for the second meeting and then send an order, usually within 48 hours. An integration from DWP's Oracle system into the organisation's core business systems helps import that data and connect those early conversations to the order. It's like ordering an opportunity qualification but using intelligence to match the two pieces of data. Initially, this information is kept anonymous until a physical order is received from DWP. Once these pieces are matched, the participant is accepted into the program, which initiates a series of activities.

Firstly, an action plan is created in the action plan management system. The participant goes through a psychometric evaluation, which assesses their journey and determines their readiness for work. They receive a login to an external customer portal, hyperlinks to fill in surveys and complete the necessary steps as they go through the coaching program. That information is registered and available in the core back-office CRM record system. The job seeker will also receive text messages welcoming them to the program and asking them to fill in their survey and complete the necessary steps.

All this data is stored in OneLake, which saves the manual effort of capturing spreadsheet notes. Most formal communications and steps the participants must take are done within the systems. The back-office CRM is tightly integrated with the environment to ensure data flows and is available in OneLake. Behind much of the action-oriented advice that the advisors give is a Rules Agent that is powered by the Analytics platform. This platform enables the organisation to integrate and analyse data from various employment sectors, allowing them to respond intelligently to customer interactions with the organisation.

We integrated AI capabilities into the customer journey, allowing real-time interaction with the customer and the advisor. AI technology provides the advisors with prompts tailored to the customer's needs. AI-powered helpers, using We Help, are embedded within Microsoft Teams, allowing advisors to ask structured questions and receive quick responses. We are also working on incorporating more unstructured data to provide better insights.

Using OneNote, we created real-time dashboards of the advisor's workload, the officer's performance, and their performance against the DWP contract. This allows the organisation to respond to changes in the market and advise DWP on interacting with incoming cohort customers to meet performance targets.

Results



The journey has been nothing short of inspiring, and we are proud to be a part of it. Powered by an innovative technology platform that underpins everything they do; the organisation has helped over 40,000 people get back to work faster. Our team has played a fundamental role in making the organisation number one among the 13 contracts in the DWP's Restart Scheme. They have continuously led rankings in performance and exceeded job outcome expectations, ultimately setting new standards for success.

By consolidating all data into a single OneLake, we have built models across that data, helping the organisation manage their operations and business while providing evidence to the DWP of their performance. The plug-and-play architecture allows the organisation to use our suite of services across all future customers. The new platform and core services are extensible, allowing the organisation to market its services to other health and well-being scenarios and new programs. This aligns with the company's vision of inspiring confidence. Now, advisors are confident in their data, and managers have the information they need to provide a happy and productive workplace experience.

This non-profit organisation receives an average of 200 new referrals every day, half of which are accepted into the Restart program. By aiding people in finding stable employment, the organisation makes a significant contribution to society. Promoting positive and enduring work environments and sustainable employment supports individuals' health and contributes to better outcomes for charitable organisations and the UK.

ABOUT FORGE TECHNOLOGIES

We design, deploy, optimise and manage modern workplace solutions to help your organisation run smarter.



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Silver
Microsoft
Partner


Cisco
Partner
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ENGAGE
FORNET ADVANCED PARTNER



Partner
Silver
Solution Advisor



Crown
Commercial
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