

## SAP Customer Success Story Public Sector – Social Services



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Mark Gibbison, Head of Policy and Performance, Trafford Metropolitan Borough Council

### AT A GLANCE

#### Summary

With 10,000 employees, Trafford Metropolitan Borough Council of Manchester, England, provides services to 211,000 residents through 400 Council and partner sites. By building on its SAP® landscape, the borough has become a proving ground for an advanced social-care system infrastructure that may help transform social services throughout the United Kingdom.

#### Web Site

[www.trafford.gov.uk](http://www.trafford.gov.uk)

#### Key Challenges

- Modernize an inefficient social-services system
- Improve operational capabilities of Council and its partner agencies

#### Project Objectives

- Consolidate paper-based and legacy databases into a single system
- Develop an end-to-end integrated social-care system
- Integrate the social-care system with the Council's financial systems to provide efficient client support
- Provide management with instant access to current performance indicators
- Enable deployment of electronic social-care records for clients

#### Solutions and Services

- mySAP™ Customer Relationship Management (mySAP CRM) solution
- SAP Records Management application, part of the SAP for Public Sector solution portfolio
- Interactive Forms based on Adobe software

#### Why SAP Solutions and Services

- Fulfilled key requirement for an integrated solution built on existing well-functioning SAP landscape
- Requisite functions provided by mySAP CRM, with the addition of social-services-specific fields

#### Implementation Highlights

- Joint implementation team was composed of members from Trafford MBC IT and Social Care, SAP Consulting, and SAP Custom Development.
- Phase 1 implementation, completed on time and free from major errors, paved the way for phase 2.

#### Key Benefits

- Single data repository covering entire social-services client base
- Easier management of clients' cases with single instance of each client accessible to authorized workers
- Integration of social-services system with Council's IT infrastructure, including financial systems
- Availability of performance indicators and current status through a management dashboard
- Reduction of paperwork and improved effectiveness through online availability of all social-services forms and report management functions

#### Implementation Partners

SAP Consulting and SAP Custom Development organizations

#### Existing Environment

- mySAP ERP solution
- mySAP Product Lifecycle Management solution
- SAP NetWeaver® Business Intelligence component

## TRAFFORD METROPOLITAN BOROUGH COUNCIL

### Building on an Existing SAP® Landscape to Create an Integrated Electronic Social-Care System

On its Web site, the Trafford Metropolitan Borough Council (Trafford MBC) of Manchester, England, characterizes itself as “. . . a borough of contrasts, diversity and above all enjoyment! From Imperial War Museum North at the heart of The Quays on the banks of Manchester Ship Canal to Altrincham's historic market that dates back to the 13th century . . .”

In addition to its tourist attractions, Trafford has even more to recommend – especially to its 211,000 residents. The borough is a proving ground for an advanced social-care system infrastructure that may help to transform social services throughout the entire United Kingdom.

Trafford MBC has 10,000 employees, of which 3,600 are office-based workers. It provides services through 400 Council and partner sites located throughout the borough. “The Council's health and social-care services are a major part of the borough's budget and one of its most important activities,” says Mark Gibbison, Head of Policy and Performance for Trafford MBC. “These services include everything from adoption and children's services to programs related to drug and alcohol, HIV diseases, and care for the elderly. To help our tens of thousands of clients, we have teams

of managers, social workers, and support personnel spread across the borough. In addition, we have records for every social-care contact in Trafford dating back 75 years. To do their job properly, our staff members need to be able to access the systems and electronic records located at any of the sites.”

### **Paper Files and Aging Legacy Systems**

“A few years ago, the Council’s records system was primarily paper files stuffed in filing cabinets and in a variety of legacy-system databases,” Gibbison continues. “To get a complete picture of the services provided to a specific client, you had to access paperwork in a number of different systems and locations and tap into our IT infrastructure, which just wasn’t up to the job. It was time for a change.”

In addition to internal pressures within the Council, there were a number of new government mandates in place encouraging local authorities to be more efficient in the delivery of social services.

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Backing up government legislation were several high-level reports that emphasized the necessity of moving from paper-based to electronic social-care systems. And, in 2003, this is precisely what Gibbison and his team set out to do.

“Modernizing social services is all about providing citizen-focused assistance and integrating various government services,” Gibbison says. “At the time, Trafford MBC was finding it difficult to meet this

goal. We had a variety of paper-based and electronic systems for both children and adult services. They needed to be consolidated into a single electronic infrastructure. So we began looking at options from several vendors and found that SAP had the capabilities and long-term vision we needed. Since we were already a major user of SAP software, it made sense to turn to them for a solution.”

Trafford MBC had already implemented mySAP™ ERP and other solutions from the mySAP Business Suite family of business solutions, such as the mySAP Customer Relationship Management (mySAP CRM) solution. Also part of their system were the SAP NetWeaver® Business Intelligence (SAP NetWeaver BI) component and environmental services solutions using the mySAP Product Lifecycle Management solution and the SAP® Business Workflow tool in SAP NetWeaver.

### **Building on mySAP CRM**

“Because we had a well-developed SAP infrastructure, we decided to build the social-care solution on top of this existing landscape,” Gibbison says. “We were already using mySAP CRM for our contact center environment. The CRM solution had many of the capabilities we needed, but not all – such as the ability to provide extensive forms and records management.”

Gibbison and his team, assisted by members of the SAP Consulting and the SAP Custom Development organizations, began working on blueprints for the expanded CRM solution in September 2003. mySAP CRM did not have to be modified. Instead, Trafford MBC used the solution’s concept of business partners to accommodate its varied client base, which included senior citizens, children and families, children within the child-protection register, people with physical and learning disabilities, and those with mental health issues.

SAP Custom Development experts expanded the fields available in mySAP CRM to accommodate the borough’s diverse social-services client population and provide essential records

management functionalities. In phase 1 of the implementation, the additional fields covered initial contact and assessment through case reconciliation.

“When the extensions to mySAP CRM were in place, we conducted a huge data migration exercise,” Gibbison recalls. “As a result, we now have a central repository of master data that covers our entire social-services client base and the borough people who serve them.”

The part of the system dedicated to children went live in April 2005; the adult portion was up and running three months later. “SAP consultants and developers met all our requirements on time and provided a system with no major errors,” Gibbison states.

### **Early Benefits**

“We are still in the early days of the implementation – people are still getting used to the system,” Gibbison continues. “But we are already seeing some significant benefits. For example, once we had transferred all the records to the mySAP CRM repository, we were able to decommission six legacy databases. Now, with a single instance of each person in a centralized repository, our social workers can manage each client’s case far more easily. For example, we built a client assessment and social-care workflow process on the back of the CRM system. The customer interaction part of mySAP CRM has been switched on, so the employee taking the initial client call is able to log the contact and then refer the query to the relevant social-worker team within social services with the push of a button.”

Gibbison says that the team had to build into the system the many rules, restrictions, requirements, and statutory deadlines mandated by various pieces of government legislation, such as the Mental Health Act and the Children Act. For example, in situations of crisis when a child needs immediate protection, the Children Act stipulates that social services can acquire parental responsibility for the duration of the order, which is 8 days (with a maximum extension of 15 days). When a social worker logs on to the mySAP CRM system, this type of information, as well as any client-specific data in the system, is available immediately.

Another part of the phase-1 implementation is to assure the financial support of clients who are receiving social care or housing. Since many of the services are supplied by external service providers, Trafford MBC is responsible for monitoring their performance. Client support is recorded and tracked in the mySAP CRM system, which interfaces with the financial accounting and controlling functions of mySAP ERP that generates payments. Also part of the integrated infrastructure is SAP NetWeaver BI, which allows social-care managers to analyze accumulated data using the software’s analytic and reporting functions.

“The system provides an end-to-end framework for case management and allows Trafford social workers much faster access to client information,” Gibbison says. “The built-in workflow processes have resulted in major gains in productivity and accuracy and have allowed the social workers to provide increased levels of care. From an operational point of view, the forms and records management capabilities that SAP has built on top of mySAP CRM have reduced the amount of files that are created internally, while improving their effectiveness. This, in turn, decreases the need for filing equipment and supplies, saving money and space.

“Another major benefit accruing from our phase-1 work is management’s ability to log on to the system and view current performance levels,” Gibbison adds. “Managers don’t have to go trolling through reams of paperwork to come up with performance figures and key performance indicators. SAP NetWeaver BI provides a management cockpit, which displays a full range of performance indicators that show at a glance how well the Council is meeting its plans. The cockpit is also a one-stop portal into everything to do with a client’s care. An authorized person logged on to the system can access all pertinent client information – case histories, referrals, other agencies or persons involved, financial records, and so on.”

## Moving into Phase 2

Gibbison says that phase 2 of the implementation is now under way and scheduled to go live in April 2006. Additional enhancements to SAP solutions will allow a social worker to pick and

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choose from a suite of care services to create the best possible combination for a client. Once the selections are made, the system will interface automatically with procurement to order the chosen services.

“The phase-2 workflow will interface with the mySAP ERP financial system, including general ledger, payables, and procurement,” Gibbison explains. “This takes all the account processing work off the financial teams. We will be using the system to enhance our relationship with the Council’s various business partners and introduce a Web-based client capability to better handle contacts. This includes using the capabilities of mySAP CRM to provide citizens with a simple, clear, and consistent access point to

Trafford MBC’s full range of services. In addition, we will be looking into adding mobile capabilities to the system to help our workers in the field.

“The development work that is being done jointly by SAP and Trafford has generated a lot of interest from other agencies all over the United Kingdom,” Gibbison notes. “This implementation could very well serve as a template for social-services agencies and government organizations, both here in the United Kingdom and abroad. We have already had inquiries from several foreign governments as well.

“But right now we are focused on achieving the best possible results for Trafford,” Gibbison continues. “With SAP’s help, we are introducing technology that is increasing Trafford MBC’s efficiency, enhancing process transparency, and helping social services communicate with the public in the most effective way possible. We have learned that our social-services performance rating is being upgraded from one star to two. The SAP implementation is a key factor in our improvement.

“Because the SAP solution supports integrated processes, it simplifies service administration and cost management, and makes available the information needed for planning and decision making,” Gibbison continues. “The solution supports end-to-end business processes that cross department boundaries and external care agencies. We have come a long way in just a few short years – and there is still a lot more to come.”