



The first AI-enabled complaints and correspondence solution for the public sector

Corporate complaints | Adult Social Care complaints
Children's Social Care complaints | Members & MP enquiries
FOI, SAR & EIA requests

Introducing CaseTracker

Developed in partnership with the public sector, CaseTracker is a complete solution for managing regulated complaints and correspondence. Easy to set up and use, it delivers **end-to-end case management** and the **regulator-ready reporting** needed to meet corporate and statutory requirements.

CaseTracker Pro and Enterprise include Octavia, the first **AI-powered complaints co-pilot** for the public sector. Octavia combines proactive complaint prevention, intelligent assistance and automation, and advanced insight to reduce workload while improving the citizen experience and organisational learning.

**Lower
administrative
costs**

**Faster
case resolution**

**Stronger
compliance and
governance**

**Better service
improvement
insight**

**Triage out
unnecessary
complaints**

**Improved
citizen
satisfaction**

“CaseTracker has helped enforce our policies & streamline our processes.

The system is flexible, easy to use and delivers what we need. The live dashboard and reports make it a great performance management tool.”

Customer Service Business
and Development Manager,
Cambridge City Council

Product tiers to suit all organisations

CaseTracker has different product tiers to support organisations of different sizes and levels of complexity – from simple complaints processes through to complex, multi-case environments.

All tiers include unlimited users and case volumes*.

Starter**Essentials****Pro****Enterprise**

Complaints and correspondence management out-the-box

CaseTracker supports all your core regulated complaints and correspondence casework**, with the flexibility to precision tune workflows per case type to align with how you work. CaseTracker Enterprise adds support for additional custom case types and workflows.

Corporate 3Cs
*Complaints,
comments &
compliments*

**Adult Social
Care
complaints**

**Children's
Social Care
complaints**

**Members
& MP Enquiries**

FOI, SAR & EIR

* AI-enabled features of CaseTracker Pro and Enterprise are subject to reasonable use (see Appendix)

**CaseTracker Starter is limited to corporate complaints only.

Product tiers summary

	Starter	Essentials	Pro	Enterprise
	For organisations with a simple complaints process	For organisations running a corporate complaints and correspondence function	For organisations seeking to reduce complaint handling effort and improve outcomes	For organisations running multi-case environments wanting advanced configuration and ongoing support
Number of users	Unlimited	Unlimited	Unlimited	Unlimited
Case volume	Unlimited	Unlimited	Unlimited	Unlimited
All core case types	Corporate complaints only	✓	✓	✓
Custom case types	-	-	-	✓
Octavia AI-powered assistance and automation	-	-	✓	✓
Support	Online only	Online and telephone	Online and telephone	Online and telephone
Managed configuration service	-	-	-	✓
Integration	Standard API	Standard API	Standard API	Support for custom integrations

The CaseTracker + Octavia Difference

Unlimited users and cases

Organisation-wide access **with no per-seat or volume-based limits.**

Starter

Essentials

Pro

Enterprise

Easy, fast adoption

A genuinely modern UI that's enjoyable, intuitive and quick to learn.

Starter

Essentials

Pro

Enterprise

Regulator-ready reporting in a single click

Produce Ombudsman and statutory reports directly from live case data with no manual reconciliation.

Essentials

Pro

Enterprise

An AI copilot for the complaint lifecycle

Reduce routine workload improve outcomes with AI-enabled triage, response drafting and learning.

Pro

Enterprise

Stop the wrong work before it starts

Detect and deflect non-complaints in real time, cutting case volumes and failure demand.

Pro

Enterprise

Handle unstructured demand, not just forms

Turn free-text emails from citizens, members and customer services into structured cases.

Pro

Enterprise

CaseTracker Starter

Manage corporate complaints consistently and with confidence

CaseTracker Starter delivers consistent, confident corporate complaints handling.

CaseTracker Starter includes the full CaseTracker Essentials feature set.

Everything described in the following Essentials section is fully available, but is limited to a single case type: corporate complaints.



CaseTracker Essentials

End-to-end case management and regulator-ready reporting

CaseTracker Essentials gives you everything you need to manage and report on regulated complaints and correspondence.



Compliance by design

Deadlines, extensions, audit trails and escalation are embedded directly into case workflows.



Efficient case handling

Structured case input, automatic triage and clear ownership reduce handling effort and rework.



Clearer communications

Consistent responses, secure messaging and timely updates support fair and transparent handling.



Regulator-ready reporting

Live operational reporting and statutory and Ombudsman returns generated directly from case data.

Intuitive case management

The screenshot displays the CaseTracker software interface. The top navigation bar includes tabs for Reports, Cases, Tasks, Customers, Staff, and an Inbox with 3 items. Below the navigation bar are filters for 'Show only', 'Case history', 'Print & export', 'Case files', 'Help', and a '+ Add item' button.

The main content area is titled 'Stage 1 Acknowledgement'. On the left, a sidebar for case 'FWC837120' provides details: Received date (29 Jan 2026), Active date (29 Jan 2026), Target date (04 Feb 2026), Status (Allocated), Service (Special Educational Needs (...)), Case type (Complaint), Incoming channel (Octavia), Assigned to (Carol Joy), Administered by (Keith Lever), and Disclosure or Adjustment Requirement. It also lists the Customer (Mr Jerry Maguire) and Work in progress (@ Acknowledgement - Complaint regarding delays and inadequate handling of child's EHCP application process). The Timeline section shows 'Stage 1 Acknowledgement' with dates: Opened Date (29 Jan 2026), Target Date (04 Feb 2026), and Raised (29 Jan 2026, 09:25).

The main content area displays a complaint letter titled 'Complaint regarding delays and inadequacies in child's EHCP p...'. The letter text reads: 'Dear Sir or Madam, I am writing to lodge a formal complaint about the way Freshwater Council handled my son William's Education, Health and Care Plan (EHCP) application and review process. I have tried for many months to resolve this matter informally through our allocated SEND case officer and the school SENCO, but the situation has become untenable. The delay, lack of communication, and the eventual outcome have caused significant hardship to our family and, most importantly, to William himself.' The letter was created by System User on 29 Jan, 09:25.

On the right, a dropdown menu for 'Add a timeline item...' lists options: Internal Note, Disclosure, LGSCO or HO Premature, Timescale Extension, Task, Settlement, and Meeting. Below this, another dropdown for 'Add a communication...' lists options: Email from customer, Email to the customer, Email for case input, Letter, and Telephone call.

At the bottom right, a 'Note added to case...' section states: 'Octavia has assessed this case and prepared the following summary:'. The summary includes:

- The complainant reports significant delays in their son's Education, Health and Care Plan (EHCP) process, with the council exceeding statutory timeframes at multiple stages.
- They state the final EHCP omits key recommendations from the school and therapists, lacking specificity about support needs.
- They describe negative impacts on their son's wellbeing and education, with multiple

Modern, timeline-based Case View

Real-time intelligence across demand, performance, quality and workforce operations

CaseTracker provides a comprehensive set of operational, management and compliance reports, generated directly from live case data.

Case volume	Case status distribution	Agent workload	Case escalation tracking
Case extensions	Reopened cases	Case data	Case category trends
Case location map	Statutory returns	Case extract	...and more

 **casetracker**

Reports

Cases

Tasks

Customers

Staff

Inbox 3

Regulator Report

View regulatory compliance metrics and service level performance.

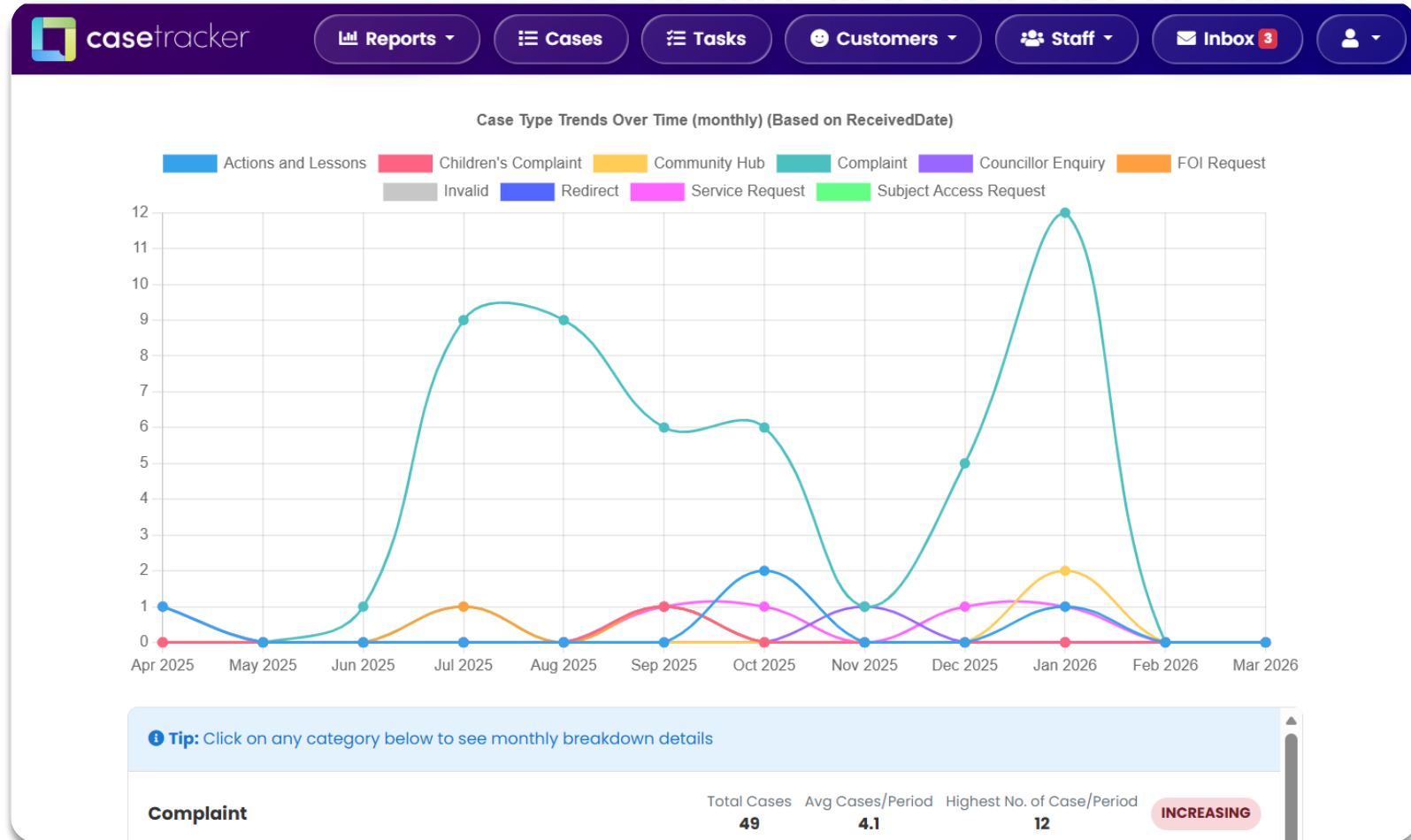
Regulator Filters

Reset Filters

Saved Filters

STAGE 1 - ACKNOWLEDGEMENTS	STAGE 1 - COMPLAINTS	STAGE 2 - ACKNOWLEDGEMENTS	STAGE 2 - COMPLAINTS
Total: 11	Total: 12	Total: 1	Total: 3
Within SLA: 10	Within SLA: 11	Within SLA: 1	Within SLA: 1
Outside SLA: 1	Outside SLA: 1	Outside SLA: 0	Outside SLA: 2
Percentage: 90.9%	Percentage: 91.7%	Percentage: 100.0%	Percentage: 33.3%

Trend Analysis



Instantly see where things are getting better or worse over time

Features & Benefits

Foundations and governance

What it is	What it does
Regulated complaint and correspondence case types	Supports corporate complaints, ASC and CSC complaints, FOI, SAR, EIR and member / MP enquiries, with the relevant workflow stages and statutory timescales. <i>Note: CaseTracker Starter includes corporate complaints only.</i>
Configurable case data	Configure services, themes, outcomes, root causes and other fields to reflect organisational needs while preserving consistent reporting and auditability.
Single-view case list	View, filter and search all cases by case type, status, date, owner and other fields.
Single-view case timeline & audit trail	Provides a complete chronological record of actions, decisions, documents and communications to support audit, scrutiny and case handover.
Role-based permissions	Define and manage access rights for case owners, administrators and reviewers to support separation of duties and information security.
Confidential and restricted cases	Apply enhanced access controls to restrict visibility of sensitive or high-risk casework.
Single sign-on (SSO)	Supports single sign-on using standard identity providers to simplify user access management and align with organisational security policies.

Features & Benefits

Case intake, triage and tracking

What it is	What it does
Standardised case intake	Provides a structured intake process that ensures required information is captured consistently, reducing follow-up and supporting accurate triage.
Case allocation and triage	Automatically route cases to the correct team or service using rule-based allocation, with central oversight for exceptions.
Case ownership and cover management	Supports reassignment, temporary cover and workload balancing to ensure cases continue to progress during staff absence.
Linked cases and contextual visibility	Link related cases to identify repeat issues, households, locations
Compliance timing calendars	Apply working-day calendars, exclude weekends and public holidays, and calculate code-specific timescales in line with regulatory definitions.
Automated statutory deadline tracking	Calculate and monitor statutory and corporate deadlines in real time.
Alerts and notifications	Notify officers and managers of key events, approaching deadlines, breaches and required actions to support timely, compliant handling.

Features & Benefits

Case progression, escalation and resolution

What it is	What it does
Configurable, compliance-led workflows	Configure stages, escalation rules and statutory or policy timescales for each case type, aligned to relevant regulatory frameworks.
Pause and extension handling	Pause statutory clocks or apply extensions in line with policy and regulatory rules, with full justification and audit visibility.
Controlled escalation and reclassification	Reclassify or escalate cases without losing case history.
Tasks and investigative work items	Assign, track and evidence investigative actions such as case input, mediation, reviews or advocacy within the case lifecycle.
Case editing and correction	Correct ownership, categorization and other case data where required, with full audit logging to preserve data integrity.
Bulk case management actions	Apply updates and reassignments across multiple cases.

Features & Benefits

Communications and transparency

What it is	What it does
Standardised communication templates	Use approved templates to ensure consistent tone, accuracy and alignment with corporate policy and regulatory guidance.
Stage-based correspondence	Apply the correct communications automatically at each stage of the case lifecycle, including acknowledgements, stage responses and escalation responses.
Secure message centre	Centralised external communications within the case record, ensuring messages are traceable, auditable and linked to the correct case.
Multi-channel communication capture	Record correspondence regardless of channel, including emails, letters, phone summaries and meeting records.
Citizen updates and visibility	Provide timely status updates to citizens to support transparency, manage expectations and reduce inbound chasing.
Internal and external correspondence separation	Clearly separate internal notes from external communications to protect sensitive information and maintain audit integrity.

Features & Benefits

Reporting & assurance

What it is	What it does
Single source of truth	Provide a single, trusted source of complaint and compliance data, reducing manual reconciliation and increasing confidence in reported figures.
Real-time operational dashboards	Provide live visibility of volumes, status, ageing, workloads and escalations for managers and teams.
Compliance and assurance reporting	Monitor adherence to statutory timescales, extensions, escalations and re-opened cases to support governance and audit.
Regulator-ready reporting	Easily produce Housing Ombudsman, LGSCO, SPSO and other statutory returns without manual data collation.
Data export and integration	Export structured case data for further analysis or integration with BI tools and other systems.
Lessons learned tracking	Record and manage “lessons learned” for every case using a dedicated workflow.
Integrations and API	Integrates with existing council platforms and workflows using secure APIs to support case management and data export.



CASE STUDY

Cambridge City Council

Cambridge City Council was an early design partner for CaseTracker, helping to shape a complaints and correspondence system that was easy to use and grounded in real public sector requirements.

CHALLENGE

An internal audit identified weaknesses in complaint handling, including inconsistent processes, limited oversight, and an inability to evidence compliance across services.

SOLUTION

CaseTracker delivered a single, council-wide complaints management system, providing structured intake, compliant workflows, auditable case handling and regulator reporting across multiple services.

OUTCOMES

- Over **1,700** complaints resolved in the last year
- Reduced resolution times through structured workflows and automatic case allocation
- Consistent, auditable handling across services
- Secure two-way messaging supporting clearer communication with residents

“The system covers everything we need and probably more, and it’s super easy to use.”

Business Development
Manager, Cambridge
City Council



CASE STUDY

Surrey County Council

Surrey County Council is a large, complex authority with a digital-first approach and a requirement for consistent complaint handling across multiple regulated service areas.

CHALLENGE

The Council needed to replace fragmented feedback tools with a single system that could support consistent recording, tracking and reporting of complaints across corporate services, Children's Social Care and Adult Social Care.

SOLUTION

CaseTracker delivered a unified complaints and correspondence platform, providing compliant workflows, consistent data capture and a single reporting framework across services.

OUTCOMES

- Over **6,500** enquiries resolved in the past year
- Council-wide visibility of case status, ownership, tasks and deadlines
- Robust, auditable workflows across corporate, CSC and ASC complaints
- Secure two-way messaging improving communication with residents
- Reduced effort in compiling reports for senior management

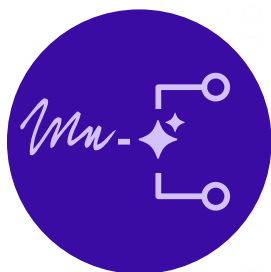
"CaseTracker has significantly reduced the effort needed to create and share reports with senior management."

Customer Relations
Manager, Surrey County
Council

CaseTracker Pro

Intelligent assistance and automation for complaints handling

CaseTracker Pro with Octavia – smarter complaints handling built for rising demand and increased scrutiny.



Handle unstructured input at scale

Turn free-text correspondence into structured information to reduce manual effort.



Prevent unnecessary complaints

Detect and deflect non-complaints in real time to minimise case volumes.



Frictionless case triage

AI-driven classification, triage and case summaries ensure cases arrive “ready to work”



Faster, compliant responses

Automated Code-aligned response drafting with human control at every stage.



Smarter insight and improvement

AI-assisted insight surfaces patterns, themes and emerging risks.

Make sense of unstructured demand

Complaints and other issues often arrive as unstructured text through emails, customer services contacts and members' enquiries. Octavia structures this content, identifies any gaps, and can automatically request clarification where needed, making it ready to be handled through the appropriate workflow.

From: alex.green@email.com
To: customerservices@council.gov.uk
Subject: Broken play equipment

Hi,
I'm emailing because there's some broken play equipment in the park opposite us that is unsafe. One of the climbing frames has a bar that's loose with sharp bits sticking out

I noticed it at the weekend when I was there with my kids and frankly I'm surprised this has already been picked up because it looks like it's been like that for a while and someone is going to get hurt if it's not fixed.

Can you please get someone to take a look at it asap.
Thanks
Alex

Date 12/09/2026

Customer Alex Green

Email alex.green@email.com

Ready for handling No

Clarification requested

Thank you for bringing this to our attention. To help us take action promptly, please confirm the name and location of the park.

Status Awaiting response

Prevent unnecessary complaints

Many issues submitted as complaints are service requests, appeals or other queries that need to follow a different process. Octavia's AI-assisted conversational form detects and reroutes these in real time, reducing unnecessary complaint volumes.

Detect, Deflect, Deter

Octavia automatically detects when a citizen is making a service request or out-of-scope complaint and redirects them to the appropriate process.

You control how this works: choose a soft **deflect** to allow the citizen to continue with a complaint, or a hard **deter** that prevents submission.

[^ Back](#)



Tell me what your complaint is about and how you'd like us to put it right. *

My grey bin wasn't emptied yesterday even though it was out at the usual place by 7am. Could someone arrange for it to be collected please? Everyone else on the street had their bin was emptied as normal.

204 characters.

It sounds like you might want to:

[Report a missed bin collection](#)

[Continue](#)

Remove upfront friction

Octavia removes friction at the start of a case, triaging issues to the appropriate service and handling workflow, and creating concise case summaries. This is particularly valuable as organisations experience increasing volumes of lengthy AI-assisted complaints.

Dear Sir or Madam,

I am writing to lodge a formal complaint about the way Freshwater Council handled William's Education, Health and Care Plan (EHCP) application and the subsequent delay in resolving this matter. For several months to resolve this matter informally through our allocated SENDCO, the situation has become untenable. The delay, lack of communication, and significant hardship to our family and, most importantly, to William has

William is nine years old and currently attends Valley View Primary School. He has a diagnosis of Autism Spectrum Disorder (ASD) and sensory processing difficulties, both of which were identified in February 2024. His challenges primarily affect communication, emotional regulation, and social functioning.

In April 2024, following several meetings with the SENCO and the school, we requested an Education, Health and Care Needs Assessment (EHCP). On 2 April 2024, and I received an acknowledgement on 2 May 2024, stating that the assessment would be made within six weeks.

Unfortunately, that statutory timeline was not met. After chasing repeatedly, we only received a response on 12 July 2024, nearly 12 weeks after submission. While it confirms the need for an assessment, no clear timescale or named contact was provided at that stage.

Between July and October 2024, communication from the Council was sporadic and did not meet the statutory timeframe for the EHCP process (from request to final plan). The assessment phase ended without clear updates. Reports from the Educational Psychologist, Speech and Language Therapist, and Occupational Therapist were all delayed.

In particular, the Educational Psychology assessment – a critical component – was only carried out on 10 October 2024, nearly six months after the initial request. This delay was explained as being due to staff shortages and high demand across the county. While I understand the pressures the Council may face, the law is explicit: families should not bear the burden of these systemic issues.

✦ Reviewed by Octavia

Service: SEND

Classification: Complaint

Summary:

- ✦ The complainant reports significant delays in their son's Education, Health and Care Plan (EHCP) process, with the assessment taking over nine months instead of the statutory 20 weeks.
- ✦ They state the final EHCP omits key recommendations from the school and therapists, lacking specificity on support needs and measurable outcomes.
- ✦ They describe deteriorating conditions for their son, including increased anxiety, school refusal and meltdowns, which they attribute to the lack of appropriate support.

Coordinated, compliant response drafting

Octavia takes on the heavy lifting of complaint handling by coordinating case input and applying organisational templates and standards to create Code-compliant acknowledgements and responses that are ready for review and sign-off.

Dear Sir or Madam,

I am writing to lodge a formal complaint about the way Freshwater Council handled William's Education, Health and Care Plan (EHCP) application and the delay in resolving this matter informally through our allocated SENDCO. The situation has become untenable. The delay, lack of communication and significant hardship to our family and, most importantly, to William has been a major issue.

William is nine years old and currently attends Valley View Primary School. He has a diagnosis of Autism Spectrum Disorder (ASD) and sensory processing difficulties, both of which were identified in February 2024. His challenges primarily affect communication, emotional regulation and functioning.

In April 2024, following several meetings with the SENCO and the school, we requested an Education, Health and Care Needs Assessment (EHCP). This was completed in April 2024, and I received an acknowledgement on 2 May 2024, stating that the assessment would be made within six weeks.

Unfortunately, that statutory timeline was not met. After chasing repeatedly, we only received a response on 12 July 2024, nearly 12 weeks after submission. While it confirms the need for an EHCP, no clear timescale or named contact was provided at that stage.

Between July and October 2024, communication from the Council was inconsistent and did not meet the statutory timeframe for the EHCP process (from request to final plan). We have not received clear updates. Reports from the Educational Psychologist, Speech and Language Therapist and Occupational Therapist were all delayed.

In particular, the Educational Psychology assessment – a critical component – was not completed until October 2024, nearly six months after the initial request. This delay, coupled with staff shortages and high demand across the county. While I understand the challenges, the law is explicit: families should not bear the burden of these systemic issues.

✦ Drafted by Octavia

Ready to review



Subject: Inadequate handling of child's EHCP application process
Case Ref: FWC917235

Dear Mr Johnson,

Thank you for getting in touch with us. We take complaints seriously, and we're sorry to hear that something isn't right.

We've summarised what you told us below.

You told us you are unhappy about:

- Delays in processing your child's Education, Health and Care Plan (EHCP), taking over 9 months instead of the required 20 weeks
- Poor communication throughout the EHCP process with sporadic updates
- The final EHCP missing important recommendations from the school and therapists
- No meeting being arranged to discuss your feedback on the draft plan
- Lack of response to your requests for a review meeting or new case officer

You told us this has impacted you by:

- William's anxiety has increased, causing school refusal, meltdowns, and sleep problems
- The family has taken unpaid leave from work to attend meetings

Turn complaints into learning

Octavia helps organisations see the big picture across complaints by enabling teams to explore common themes, recurring issues and emerging patterns using natural language questions.

Q Octavia, what were the main drivers of housing related complaints last quarter?

xx/xx/xx	Xxxxx xxxxxxx xxxxxxx	Xxxxxx xxxxxxxxxxx
xx/xx/xx	Xxxxxx xxxx xxxxxx xxxx xxxxxxx	Xxxxxx xxxxxxx
xx/xx/xx	Xxxxx xx xxx xxxx xxxxxx xxxxxxxxxx	Xxxx xxxxxxx
xx/xx/xx	Xxxx xxxx xxxx xxxxxxx	Xxxx xxxxxxx
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Communication

Being told someone will call them back with no follow-up recorded

Contractors

Contractors leaving properties untidy or unsafe after visits

Damp & mould

Mould returning, repeated treatments ineffective

Features & Benefits

Control complaint demand at the point of entry

What it is	What it does
Intelligent unstructured demand ingestion	Interpret free-text emails from citizens, members and MPs, extracting intent, classifying issues and creating structured cases aligned to workflows.
AI-assisted smart forms	Guide citizens through complaint submission using conversational, accessible forms that detect intent, validate inputs and reduce incomplete or misdirected submissions.
Non-complaint detection and deflection	Identify service requests, appeals and out-of-scope issues across forms and emails and redirect them to the correct process before they enter the complaints workflow.
Automated data validation and completion	Identify missing or unclear information and request clarification before a case is created, ensuring work arrives ready to handle.
Configurable complaint definition rules	Apply organisation-specific rules to define what constitutes a valid complaint and how different issues should be handled or routed.

Features & Benefits

Reduce manual effort and improve quality

What it is	What it does
AI-assisted classification and triage	Suggests categorisation and service area for accepted cases to reduce manual triage and support consistent handling.
Concise case summaries	Produces clear, structured summaries of long, complex or AI-generated correspondence to reduce reading time and support faster understanding.
Code-aligned response drafting	Prepares compliant acknowledgements and stage responses aligned to statutory timescales, handling codes and local policies.
Context-aware handling co-pilot	Support caseworkers by surfacing relevant guidance, prior cases and contextual information.
Configurable automation with human oversight	Full control of where automation is used, with human review in place where required.

Features & Benefits

Deeper insight into complaint demand

What it is	What it does
Complaint theme analysis	Analyse complaint narratives at scale to surface emerging themes, patterns and areas of concern.
Insight augmentation	Complement existing dashboards and reporting with qualitative insight.
Natural language querying	Ask questions about complaint themes, trends and narratives in plain language

Octavia AI design principles ✨

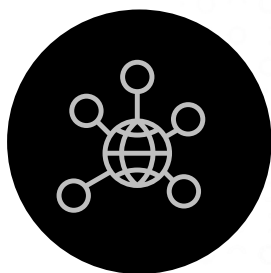
Octavia is designed to reduce repetitive, low-value handling effort and improve insight in a safe and controlled way.

All AI-assisted actions operate with human oversight and can be configured by case type or service area. Organisations control where automation is applied, what actions Octavia can take, and where human review is required. Decisions and recommendations are explainable, auditable and visible within the case record, ensuring accountability and compliance with public-sector governance requirements.

CaseTracker Enterprise

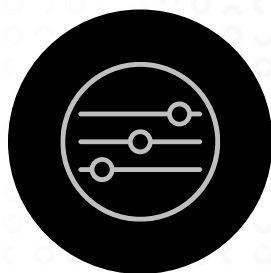
Advanced configuration and ongoing support

CaseTracker Enterprise – advanced configuration and support for complex organisations



Designed for multi-team, multi-case environments

Supports advanced and bespoke case types and workflow without adding user complexity.



Hands-on configuration and optimisation

Active, ongoing support to configure and refine case types, workflows and rules as your environment evolves.



Dedicated enhancement capacity

Includes an annual allowance of **35 hours** for enhancement work dedicated to your organisation.



Partnership working and regulatory assurance

Ongoing collaboration and compliance advice and support.

Service assurance

Proven delivery, reliable support and long-term confidence

Security, accessibility and integration

Security, data protection and compliance

- Hosted in secure AWS cloud infrastructure within the EU, backed by our SLA
- AI processing carried out using AWS Bedrock
- ISO 27001-accredited information security management, Cyber Essentials Plus certified
- Role-based access controls with comprehensive audit logging
- GDPR-compliant processing with clear data ownership and retention controls

Accessibility and usability standards

- Citizen-facing interfaces independently audited to **WCAG 2.2 AA** accessibility standards

Integration and interoperability

- Secure APIs supporting integration with existing systems, including:

Case intake and creation

Case lifecycle access and updates

Reporting and data extraction

AI configuration and control

Onboarding and implementation

Typical onboarding is **4–12 weeks**, depending on the number of case types, integrations, AI and reporting requirements.

A named Implementation Manager will work with your team to configure CaseTracker to local policies and regulatory processes, focusing on:

- Configuration of case types, workflows and data structures
- Setup of communications, forms and reporting
- User access, permissions and security configuration
- Integration support with existing systems
- AI behaviours, policies and rules (Pro and Enterprise only)
- Testing, training and go-live readiness

Ongoing flexibility after go-live

There are no charges for configuration changes after go-live. Workflows, templates, service lists, permissions and reports can be adjusted as requirements evolve.

Support and customer success

- Service desk support (phone and online) available 9am–5pm, Monday–Friday for operational queries
- Quarterly service reviews to review performance, usage and new requirements
- Webinars and briefings covering platform updates, best-practice configuration and regulatory change

Enterprise support

For Enterprise customers, standard support is extended through a proactive, partnership-led approach.

- Direct access to named points of contact
- Regular engagement to review configuration against organisational needs, regulatory requirements and risk
- Customer-prioritised configuration and enhancement work delivered as part of the Enterprise allowance

Strategic outcomes

CaseTracker's combination of platform capability, configuration and ongoing support enables organisations to achieve strategic outcomes across risk, resilience and public trust.



Resilience and a reduced cost of delivery

Reduced failure demand, efficient workflows and lower handling effort help manage rising complaint volumes without additional cost or staffing.



Greater confidence in complaints data

A single, trusted view of complaint volumes, timeliness and outcomes supports decision-making and external reporting.



Reduced exposure to regulatory risk

Consistent handling, clear audit trails and regulator-ready reporting support confident oversight and assurance.



Improved public trust

Clearer communication, predictable handling and fewer missed deadlines improve confidence in how complaints are managed.



Continuous improvement

Structured insight supports ongoing service improvement beyond reactive compliance.

Why GovMetric?

GovMetric builds software that solves real customer problems across public-sector automation, compliance and citizen experience.

We've worked in the sector for over two decades, helping our customers to manage citizen-facing, regulated processes as they come under increasing demand and scrutiny. Spanning citizen feedback, complaints management and compliance automation, our products work together to improve efficiency, reduce risk and deliver better citizen outcomes.



GovMetric CX

Citizen feedback
and experience
management



CaseTracker

Complaints and
correspondence
management



Octavia

AI-powered
complaint
handling



Nexa

Automated
document drafting
for compliance

What next?

If you're exploring ways to streamline complaints handling, you can visit our website to:

- Find more case studies from public-sector organisations
- Watch video testimonials from customers
- Learn about emerging trends in AI and public sector automation and compliance.
- Find upcoming webinars and events

When you're ready, get in touch for a conversation about how we can help.

govmetric.com

Email: procurement@govmetric.com

Phone: +44 1572 756565

LinkedIn: linkedin.com/company/govmetric/