

Hanlon Employability and Business Support Case Management Overview



PROGRAMME AND CASE MANAGEMENT SOFTWARE FOR ECONOMIC DEVELOPMENT INITIATIVES

If you work with local residents to improve skills and remove barriers or
support local businesses to grow and create job opportunities
our software and expertise can help you

1 What it does.

Hanlon Client is a web-based IT solution used throughout the UK to manage welfare to work, health & well-being and economic development initiatives. Basically, it does the following:

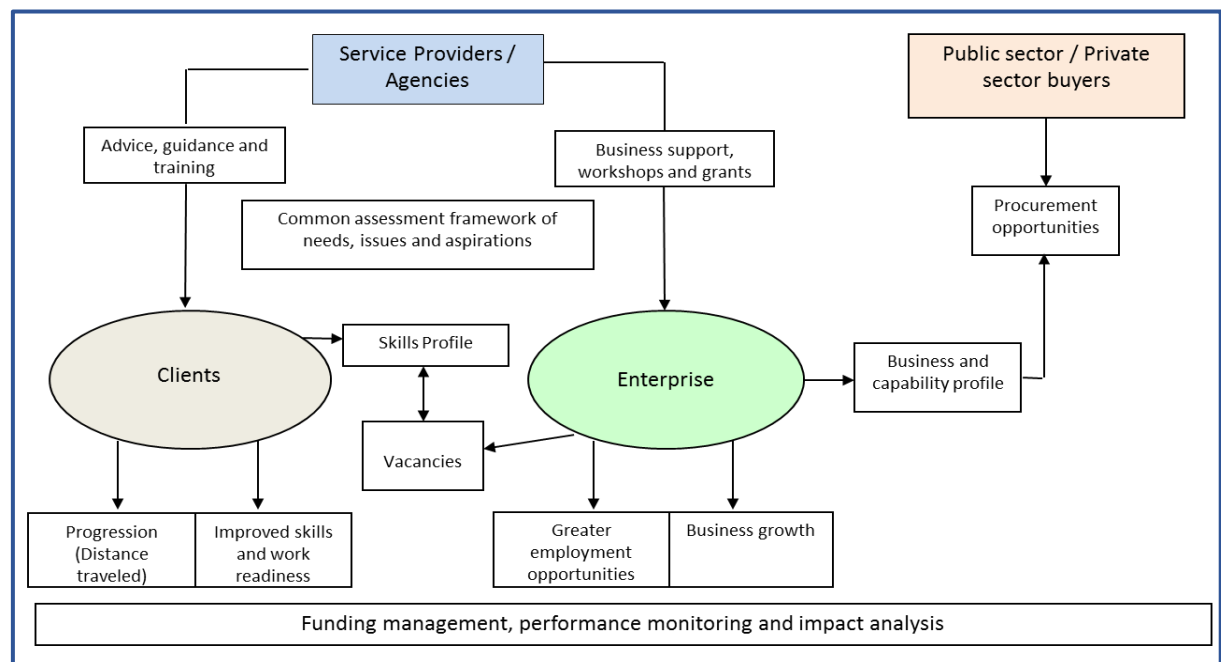
- **supports** people with multiple barriers to help improve quality of life.
- **helps** local people into local jobs and records the achievement of many more types of outcome.
- **links** residents, service providers and employers to everyone's mutual benefit.
- **manages** the delivery of interventions and outcomes to people and businesses.
- **monitors** community benefit obligations and many other socio/economic programmes.
- **reports** on all areas of the system for funders, programme managers and advisors.
- **secures** data confidentiality by applying customisable data sharing protocols.

The system is modular - customers choose the features that work best for them. All the modules are seamlessly integrated – creating a total management information solution for local employability, business growth and economic development initiatives.

The key deliverables are supporting local residents into work, addressing barriers to progression, supporting local businesses, matching to opportunities, managing funding and monitoring performance.

Hanlon supports multi-agency delivery assuring the most appropriate support for all participants.

The diagram below illustrates the linkages between the main system entities.



The system is ***highly configurable*** and can be set up to work with any type of initiative where the progression of clients and engagement with businesses are key.

Example programmes include:

- Employability.
- Work experience.
- Health and well-being.
- Community benefit.
- Business development.

Data management and client confidentiality are at the heart of the system. User profiles are configured to see only the data and features that are relevant to their job role. Additional modules can be added post-implementation.

The system also benefits from a ***powerful and flexible reporting*** module.

2 System modules

2.1 Client CRM.

- Registration.
- Assessment.
- Action plans.
- Activities, interventions and outcomes.
- Referrals and data sharing.
- Skills and job matching.
- Client programmes and eligibility.
- Drop in and attendance.
- Progression monitoring.

2.2 Enterprise CRM.

- Registration.
- Contacts.
- Profiles, sectors and capabilities.
- Service provider and contract management.
- Activities and interactions.
- Client links.
- Business enquiry, grants and loans tracking.
- Community benefit and Section 106 management.

2.3 Vacancy management.

- Management of different opportunity types, for instance jobs, apprenticeships, work experience, volunteering and training.
- Vacancy task management, for instance risk assessments and visits.
- Job matching.
- Client activity links, for instance job submissions, interviews and placements.

2.4 Programme and project monitoring.

- Funding management.
- Outputs and outcomes monitoring.
- Project milestones tracking.
- Project Interactions, including details of meetings, emails and text messages.
- Project risk management.
- Asset tracking.
- Document management.
- On-line monitoring.

2.5 Additional modules

- Appointment booker.
- Training course management.
- Address and location management.
- Events management.
- Work experience management.
- Family links.
- Provider search.
- Community Learning and Development.

Below is a list of the generic features that are available throughout the system:

1. Document management.
2. User alerts.
3. User calendar.
4. MS Outlook link.
5. MS Teams integration.
6. User dashboards.
7. Web reports for advisors, managers, performance information and claims.
8. Batch SMS, emails and mail merge.
9. Post codes and areas link to Local Authority, Ward, LEP, Job Centre Plus district, Super Output Area and Indices of Multiple Deprivation bands.
10. GDPR compliance.
11. Audit logs.

3 Benefits

- Co-ordinate customer services across multiple providers to save time and money.
- Create a single holistic customer record enabling providers to work more collaboratively.
- Share assessment and outcomes data safely to achieve positive outcomes more quickly.
- Connect residents, businesses and service providers to everyone's mutual benefit.
- Share business records to communicate efficiently with businesses.
- Standardise reports to meet statutory reporting requirements.
- Produce customised reports to place key information at the fingertips of programme and case managers in seconds.
- Easily configure the system to fit any programme and create long-term value for money.
- Hanlon's commitment to continuous product development creates a long system 'shelf life'.

4 The Hanlon Employability Web Portal

The Hanlon Portal is a public facing web site that ***integrates seamlessly*** with the Hanlon Case Management system. The portal can be styled to meet brand guidelines and content can be added and amended.

- The portal supports engagement with local residents and communities.
- It enables local businesses to publicise their job opportunities and demonstrate 'reasonable endeavours' to meet their community benefit and Section 106 obligations.
- And it provides a 'self-help' job search and application facility for local residents.

Three current examples of the portal are listed below:

1. Ealing Council employment support portal. <https://workealing.com/>
2. Lambeth Council employment and skills portal. <https://be.lambeth.gov.uk/>
3. Haringey portal. <https://works.haringey.gov.uk/>

Each page on the portal is designed to contain elements of the Hanlon CRM system. Listed below are examples of the web pages that are available and the elements they contain:

4.1 Landing page.

- Project details.
- Vacancy RSS feed.
- Service provider search.
- External links to partner websites.
- Links to good practice, information, advice and guidance sites.

4.2 Residents page.

- Sign up.
- Triage, including eligibility check and assessment of support needs.
- Skills profile and job matching.
- Qualifications and references.
- Job preferences, notifications and applications.
- Upload documents, including CVs, copies of certificates and evidence of eligibility.
- Search for appropriate support.
- Book an appointment with an adviser.
- Feedback and surveys.

4.3 Service provider page.

- Sign up.
- Account management.
- Profile the services on offer.
- Post and track opportunities.
- Contract management and completion of monitoring returns.

4.4 Enterprise page.

- Sign up
- Account management
- Create a profile, for instance main sector of activity, size, accreditations, risk assessment and financial analysis.
- Post and track opportunities.
- Section 106 and community benefit monitoring.

4.5 Work experience page.

- Student, teacher and parent/guardian sign ups.
- Search for opportunities based on date range, type and location.
- Express interest in an opportunity.
- Management of notifications to students, guardians, employers and teachers.
- Central management of risk assessments and reporting.

Each portal is built from the Hanlon Base Portal, which has the links to the Hanlon CRM already embedded. This makes it very quick and cost effective to design and implement new branded portals.