



SERVICE DEFINITION

Case Management Optimisation & Transformation

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1. Introduction

The Keystream Consulting team work with leadership, case workers and other staff involved in the case management process to optimise the value, benefits and experience of existing and new case management systems. Adopting a people-centred approach, we spend time with staff to learn how they work, what changes to practices could maximise system capabilities, and support staff adapt ways of working, improve adoption, increase performance, productivity and deliver better outcomes. We combine deep technical expertise with pragmatic hands-on change experience, working closely within your teams to take a user led approach to system optimisation and make the changes happen.

2. Service Features

- Strategy, options, business case development, procurement, design, change, PPM
- Shadowing and user research with case workers and service users
- Change / amend system functionality to meet user needs
- Provide training/development to staff to better use the system
- Develop implementation plan to ensure continuous improvement
- Design effective change management strategies across all stakeholders
- Establish and improve supplier relationships to leverage expertise
- Design future capabilities, systems, processes to optimise systems
- Develop measurement / benefit realisation method and framework
- Including housing, education, adult social care, children's services, customer services

3. Service Benefits

- Cost effective approach to bring in hands on delivery experience
- Builds confidence in how to use the system effectively
- Identifies productivity improvements to free up frontline staff time
- Flexible and agile team dynamic to changing needs and priorities
- Practical and not theoretical approach to deliver high value
- Identification of workflow and process efficiencies from optimisation
- User centred approach builds buy in to the change
- Evidence based research to support case for change
- Upskilling and knowledge transfer central to how we work
- Prioritises sustainable change over quick fixes

4. Planning

Keystream assists organisations in effectively transitioning to cloud hosting or software services by evaluating the existing infrastructure and business objectives, crafting a customised strategy for cloud adoption. Our consultants help in selecting suitable cloud solutions, negotiate contracts, and ensure smooth migration while mitigating disruptions. We also facilitate change management, offering training and addressing concerns to align the organisation with the new technology. Throughout implementation, our consultants oversee data migration, conduct testing, and monitor performance. Post-implementation, we provide ongoing support and optimisation to maximise the benefits of cloud technology.

5. Set up and Migration

Keystream have invested in specialist tooling and resources that support our core business services of migrating to the cloud or between cloud services. There are three main phases to this service, and our methodology can be summarised as follows. Firstly, we accelerate the process of understanding the key relevant characteristics of our clients digital portfolio, and match them against available services to help select the best fit, at the best cost. We then maintain tools that allow the relevant definitions and codes in a way that is service independent, so we can easily build a service on any of the leading cloud platforms, and equally switch that service to another platform. Finally, we also maintain tools that simplify the migration process, including the build of office 365 environment, as well as the varied methodologies for moving data to cloud hosting services.

6. Quality Assurance and Performance Testing

Keystream support with quality assurance and performance testing through several key steps:

Assessment and Planning:

Initially assessing the project requirements and objectives, along with understanding the client's quality standards and performance expectation we create a detailed plan outlining the testing strategy, methodologies, and tools to be employed utilising the following steps Requirements Analysis, Test Design, Execution and Monitoring, defect management, performance tuning, reporting and documentation and finally continuous improvement.

By following our methodology in QA and PT we Keystream ensure that any cloud solution post implementation has been tested to perform as per the requirements of the service.

7. Training

We collaborate closely with our clients throughout the project and service lifecycle to comprehensively grasp their training requirements and develop a tailored approach to ensure a successful transition to cloud services. Our training methods encompass:

- On-site one-to-one coaching, facilitated group training sessions, video tutorials, training documentation, and video conference training sessions.
- Mentoring: Direct support and knowledge transfer provided to in-house staff and/or other suppliers as an integral part of working alongside our service teams.
- Shadowing: Offering part or full-time support to one or more client individuals, specifically

aiding them in managing their daily tasks, providing real-time assistance with new roles and responsibilities.

- Informal training sessions: Short, focused sessions covering relevant topics to enhance staff effectiveness and introduce new ideas. These sessions can be conducted during lunchtime or at the end of the day as feasible.
- Establishment of a Knowledge Repository: Encouraging the development of a shared platform for storing valuable resources such as collateral, examples, templates, and case studies to facilitate enhanced collaboration across the organisation.

8. Ongoing Support

Keystream provides ongoing support for our services. Ongoing support is discussed and incorporated into any of the services Keystream provide with our customers. Support is based upon a per user pricing which can be found in the pricing document. Support outside the engagement can be requested through an RFS and priced accordingly in the pricing document. A technical account manager will support all organisations on every engagement which is included within the support cost.

9. User Support

Support is provided across the scope of the service. Account Management is conducted at regular intervals at both a technical and organisational level. All support costs are incorporated into the service.

10. Staff Security

All staff can possess DBS or BPSS security standards.

11. Pricing

Please see our pricing rate card for pricing details