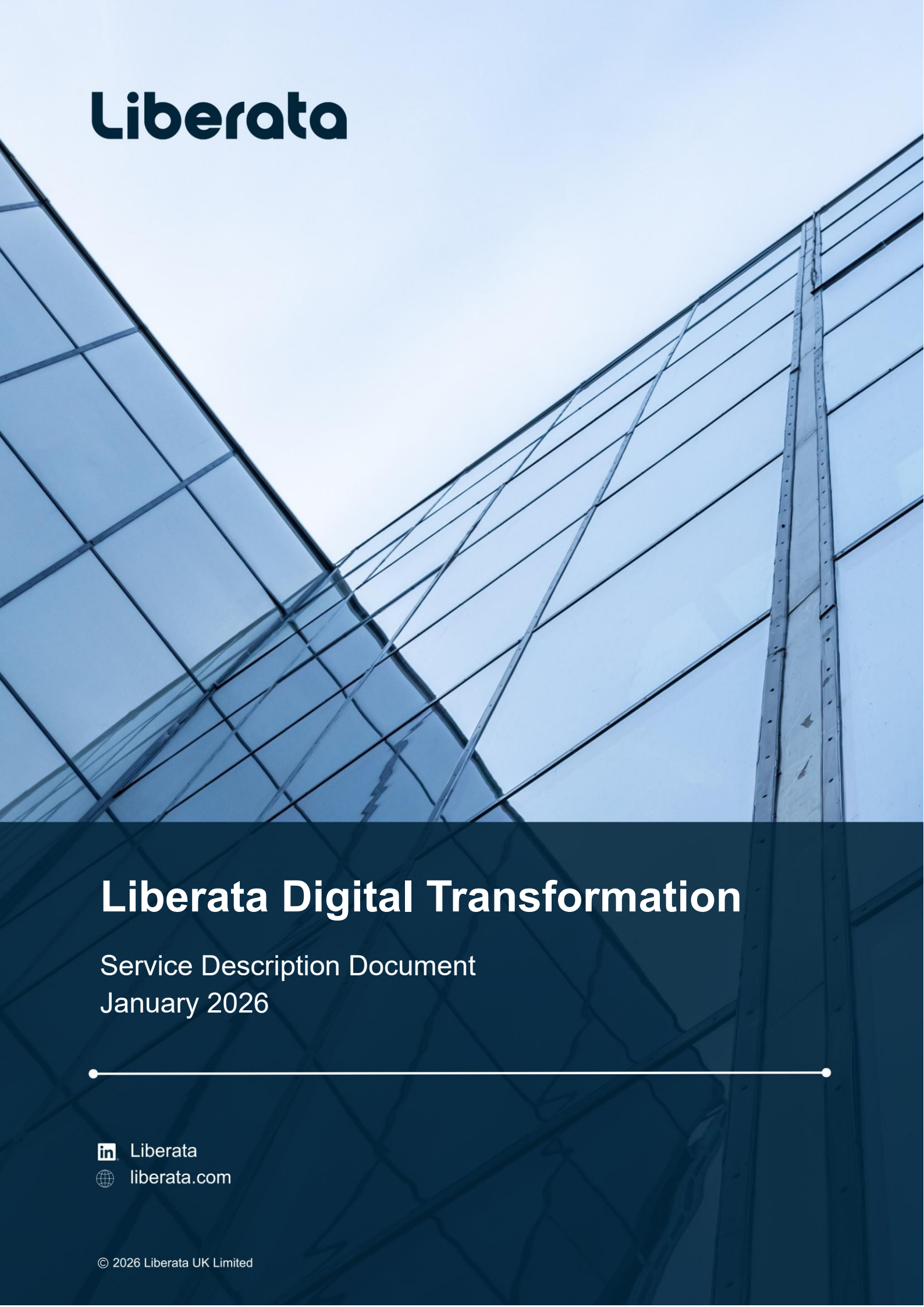




Liberata

Liberata Digital Transformation

Service Description Document
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 Liberata
 liberata.com

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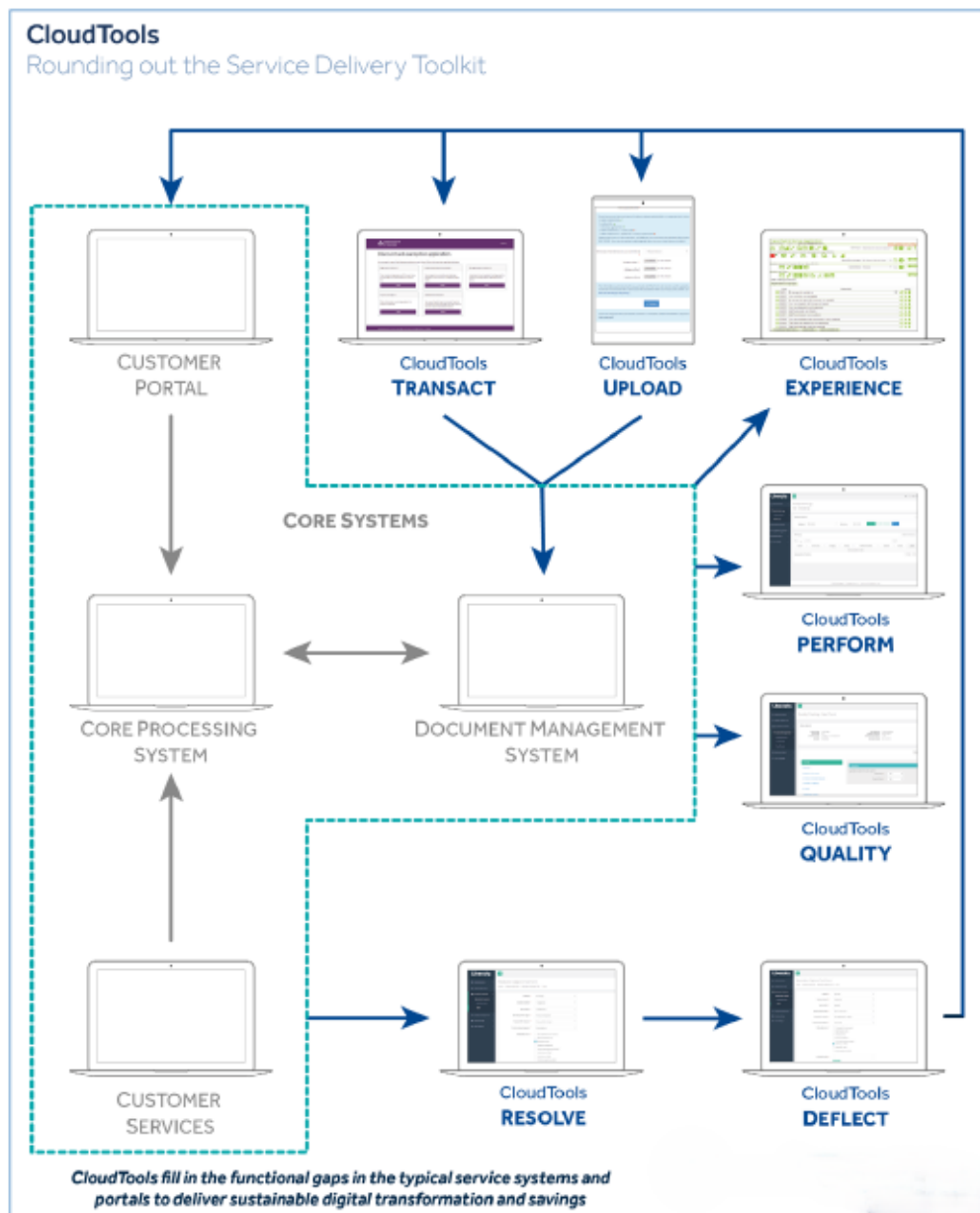
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Liberata Digital Transformation Solutions

Overview

Liberata has been delivering local government Revenues, Assessments and Customer Services for over 45 years. Over that time, we have evolved, innovated and improved the way that we deliver our service to customers, leading to the development of both our CloudTools suite of products and our supporting Going Digital programme to ensure that digital services become the first point of contact for customers.

CloudTools support sustainable digital transformation by rounding out the capabilities provided by commonly used customer portals. CloudTools both complete the online toolkit and provide service teams and managers with the tools necessary to deliver the cultural and productivity changes that are key to delivering savings.



This may be further supported by a wider Going Digital programme that takes services through three key stages over a flexible 12–36-month implementation period to deliver sustainable digital transformation using a myth busting, marginal gains approach to improving digitisation through all aspects of service delivery.

- **Digital First** – Focusing on actively encouraging customers to transact using structured channels that are designed to be utilised digitally. This stage will typically deliver 20-25% channel migration over 6-18 months.
- **Digital by Design** – Focusing on actively driving customers towards digital channels where they can transact effectively. This stage will typically extend channel migration to 35-45% from months 6 to 24.
- **Fully Digital** – Focusing on exclusive use of digital channels, but with customer facing teams transacting on behalf of vulnerable customers who are unable to transact effectively themselves. This stage will typically extend channel migration to 70-90% migration over the remaining implementation period.

Critically, Going Digital works alongside the CloudTools suite to help to reduce the self-defeating behaviours that undermine effective digital transformation, whilst simultaneously enforcing appropriate, productive behaviours within service teams by both managing their outputs and most importantly by making it easy for them to support digital transformation.

CloudTools Solution

Each component of the CloudTools suite is designed to provide actionable intelligence regarding the services requested by customers, the actions taken to deliver those services and the customer perception of the service. This enables clear, quantified development plans to be defined, implemented and measured to ensure outcomes are achieved.

The components of the CloudTools suite can be split into the following functional groups:

- Processing Support Tools
- Customer Management Tools
- Online Toolkit Enhancements
- Customer Experience Measurement

Each of the CloudTools components are provided as a Software as a Service (SaaS) platform and can be procured as individual components or as a full suite of tools. We will outline the capabilities provided by each in turn below:

Processing Support Tools

Designed to support processing teams within a Revenues and Assessments back-office environment, we offer performance and quality management toolkits within the CloudTools suite.

CloudTools Perform

The core processing systems associated with the delivery of Revenues and Assessments services lack the ability to monitor employee productivity on an individual level, whilst team leaders and service managers are unable to effectively track and manage the availability and utilisation of employees.

CloudTools Perform captures staff activity and assesses that activity against output. The Perform toolkit provides:

- **Time & Attendance Monitoring** – Timesheets capture all attendance & non-attendance information, including Sickness, Annual leave, and Flexi-Time Management.
- **Productivity Monitoring** – Interfaced with your document management or processing system to provide full detail of work processed per team member.

- **Deployment Information** – Fully configurable activities, organised by transaction, non-transaction, and non-work groups provide detailed information on deployment at an individual, team or service level.
- **Reporting Capability** – Presentation of the full range of performance data across a range of interactive dashboards.
- **Compliance Monitoring** – Capability to monitor compliance against a range of measures including timesheet non-entry, attendance, start time, flexi and return to work.
- **Employee Reviews** – Auto population and generation of employee review templates. Contains key officer performance data to support reviews. Officers can monitor and print off records of their own performance.

Implementing this capability typically provides a **25% productivity increase** on transactional work (which typically accounts for just over 40% of employee spend), equating to approximately a **10% saving on service staffing budget per annum**.

CloudTools Quality

Typically, Revenues and Assessments core processing systems lack the ability to measure service accuracy and quality, meaning that leaders and service managers are unable to balance throughput against the process by which employees follow, and the accuracy of the final decision is made.

Traditional quality checks typically focus on calculation accuracy and not the process undertaken or the customer experience associated with the processing of an application. In many cases, these checks are undertaken in an ad-hoc manner, with a different focus depending upon the skills and viewpoint of the checker.

The use of CloudTools Quality resolves these issues by ensuring that checks are undertaken in a structured and consistent manner across all teams, whilst providing managers with clear and actionable intelligence to allow early intervention if service quality dips at any point. The primary components of the toolkit are:

- **Full Benefits Checking** – A detailed 15-page full check that covers all aspects of processing including identity, security, dates, income & outgoings, capital, applicable amounts, household composition, rent, payees, decisions and backdating. Typically used for monitoring new employees and high-risk claims.
- **Short Benefits Check** – Concise single page check covering evidence provision, liability, payments, backdating, letters, overpayments, and housekeeping. Typically used as the day to day checking of caseload samples.
- **Revenues Processing Check** – Comprehensive billing check covering occupations & vacations, refunds, exemptions, write-offs, tracing, inspections, outbound communications and VOID accounts.
- **Recovery Check** – Focused check covering all aspects of the recovery process including arrangements, bailiff returns, letters and insolvency.
- **Officer Feedback** – All checks generate feedback to the case officer, detailing the cause of the error and any required remedial actions. Officers can respond to the feedback within CloudTools Quality to ensure that all issues are captured and can be picked up in one-to-ones.
- **Reporting Capabilities** – A full reporting suite providing details of all checks undertaken, error rates and types alongside the progress of scheduled and outstanding checks. Individual officer reports are available to inform coaching and development activities.

Implementing this capability typically provides an increase in productivity over the course of a year as errors are fed back to team members in a way that reduces re-work of individual cases and the instances of housing benefit overpayments.

At a service level, CloudTools Quality provides confidence that service quality and accuracy can be effectively managed, protecting the Council from subsidy loss through Local Authority Error and helping to maintain vital income streams.

Customer Management Tools

Designed to support the management of customer interactions across all service lines, we offer customer enquiry monitoring and channel deflection toolkits within the CloudTools suite.

CloudTools Resolve

Effective customer management requires clear intelligence regarding the reasons for customer contact and the actions undertaken by customer service teams as a result. Unfortunately, in most service line and CRM systems, the reasons for customer contact are hidden in the document management system document and notes fields. This prevents the effective capture and subsequent analysis of reason for call traffic, meaning that the prevention of customer contact is practically impossible.

CloudTools Resolve measures the reasons behind customer contacts and the outcomes of each to help remove avoidable contact. The primary components of the toolkit are:

- **Contact Capture** – Allowing the capture of real issues that cause customer contact, which can then be split by service line, process and subsequent action taken.
- **Comprehensive Reporting** – Including a range of standard reports that allow team leaders and service managers to undertake:
 - **Avoidable Effort Analysis** – Quick and easy identification of avoidable contact within customer services, delivering actionable intelligence with the ability to split this by service line and process.
 - **Customer Service Monitoring** – Driving customers to use online services requires customer service teams to actively promote and enforce the use of online services. Resolve allows this activity to be monitored and reported to allow service managers to ensure that all staff fully play their part.
 - **Channel Migration Scoping** – Most channel migration targets are entirely arbitrary numbers but by using this toolkit the analysis of actual customer contact data can be used to determine what migration levels are achievable.
 - **Stakeholder Management** – Central contact centres often struggle with internal stakeholders driving additional contact into the service. The toolkit allows this to be actively monitored and where appropriate recharged precisely based on changes to the mix of service processes delivered.

The implementation of CloudTools Resolve ensures that service managers have actionable intelligence to inform service changes designed to reduce avoidable effort. When this is applied, we typically see up to a **60% reduction in avoidable contact** within customer services and an **80% increase in customer service advisor compliance** with digital transformation requirements.

When Resolve has been applied to Liberata's own customer service operations and local authority clients, which have already delivered significant savings through digital transformation, we have delivered an **additional 10-15% saving in Customer Service staffing levels** for each of our clients.

CloudTools Deflect

Fundamentally, Customer Service teams exist to help customers and are recruited to reflect an aptitude to help people. When undertaking extensive digital transformation, these same teams often struggle to refer customers to online channels as it appears to many officers as that they are offering a poor service or indeed lack the confidence to direct customers through these channels.

CloudTools Deflect is designed to help staff painlessly ease customers towards online services and other specialist stakeholders whilst providing a monitoring and enforcement feedback loop within the

service to ensure that this is being done in practice. Provided as an additional module to CloudTools Resolve, the primary components of the Deflect toolkit are:

- **Seamless Link Provision** – After selecting the relevant service line process and outcomes in Resolve, the officer is then prompted to capture the customers email address or mobile phone number. Upon submission of the form links are then automatically sent to the customer.
- **Customised Link Management** – Providing the ability to direct customer to information resources or transactional services depending on the Councils specific requirements.
- **Gov Notify Integration** – Integrated into the Councils Gov Notify account to ensure that the email and SMS messages containing the links are sent from trusted sources and are cost free to the Council.
- **Reporting Capabilities** – Reports provide clear insight into which staff are using the tool, how many customers have been provided with links and crucially which service lines and processes are being referred online. The report can be analysed by service line to identify the gaps in the enforcement of online service delivery.

Implementing the Deflect tool reduces the time taken for staff to handle a simple information request or transaction by sending a link to the customer that contains all the information they require. A **50% reduction in handling time** for these queries are normal, alongside a **60% reduction in repeat enquiries** from the same customers. Typically, this equates to an **overall 25% reduction in customer service staffing levels** and significant yearly savings alongside greater customer satisfaction and reduced level of complaints.

Online Toolkit Enhancements

Designed to extend the capability of the commonly available customer portals in the Revenues and Assessments sphere, we offer transactional forms and evidence submission capabilities within the CloudTools suite.

CloudTools Transact

Gaps in online form provision encourage customers to continue to use traditional channels on the basis that “I tried online, but you didn’t have what I needed”. CloudTools Transact provides a full suite of 26 forms across the Revenues and Assessment service providing a simple means of keeping customers online where the commonly used customer portals do not provide transactional capability. The primary components of the toolkit are:

- **Benefits Forms** – These include customer questionnaires, landlord questionnaires and requests for the landlord portal access.
- **Council Tax Forms** – These forms include a comprehensive discounts and exemptions form, disabled band reduction form, refund requests, means testing and previous occupier tracing
- **Business Rates Forms** – These cover means test forms, refund requests, relief and exemption applications, and direct debit set-up.
- **Form Output** – All forms output to a structured PDF file that is transferred via an encrypted secure FTP connection to the Council. If the Council prefer, we are able to use secure e-mail to send the PDF files to a specified Council mailbox. Our structured output allows rapid manual indexing of the received files by Council officers or, if the relevant document management system module is available, auto indexing of the documentation against the relevant referral type and customer account.

The implementation of CloudTools Transact provides a more comprehensive customer online offer, improving online retention rates for customers who have attempted to access services online, which in turn leads to improvements in speed of processing KPIs. In addition to this information processed tends to be updated in real-time and it reduces the risk of any manual error or information being ‘lost’.

CloudTools Upload

Customer portals typically offer the ability for evidence to be submitted within an application. This can typically be delivered across any local government service line and allows evidence provision at any time in the assessment or review process. The primary components of the toolkit are:

- **Simple Web Form** – We provide a simple, easy to use web format that is presented to customers as part of the Council website. The form is mobile responsive and allows customers to photograph their documentation using a mobile device and attach it to a simple form that allows their customer account to be easily identified.
- **Structured Output** – The output from the web form is captured as a PDF document that is transferred via an encrypted secure FTP connection to the Council. If a Council prefers, we can use secure email capabilities to send the PDF files to the relevant Council service mailbox. Where a document management system is available, our structured output allows rapid manual indexing of the received files by Council officers or, if the relevant document management system module is available, auto-indexing of the documentation against the relevant document type and customer account.

Implementing CloudTools Upload is a key enabler of improved online services take-up, ensuring that customers continue to contact the Council digitally, whilst driving improved speed of processing performance in all service lines using the tool.

Customer Experience Measurement

Designed to monitor the customer perception of service delivery in a changing service environment, CloudTools Experience provides, clear actionable intelligence regarding service performance, supporting effective decision making and service development.

CloudTools Experience

Customer satisfaction surveys typically offer a limited means of assessing the customer experience. These range from single question 'smiley face' surveys to more complex citizens panel surveys, balancing survey take-up rates against the level of information gathered. Across local government, less than 1 in 50,000 customer interactions are subject to a customer survey.

With the ability to be used on an automated basis, or via staff mediated mechanisms CloudTools Experience allows the customer experience to be measured rapidly, regularly and robustly. The primary elements of the toolkit are:

- **Single Multi-Channel Form** - We provide a single, easy to use web form for customers to record their feedback. This form allows the capture of customer experience information across all access channels, tailoring questions to suit the dynamics of each channel.
- **Front / Back Office Focus** - We provide clear, unambiguous differentiation of feedback between the elements of frontline customer service and supporting service lines that impact on the overall experience.
- **Structured Reporting** - Our reporting allows analysis of the overall customer experience as well as differentiation by access channel and service line.
- **Bulk & Automated Surveys** - Allowing surveys to be sent from core business systems on closure of a case or manually using bulk data extracts on a cyclical basis.

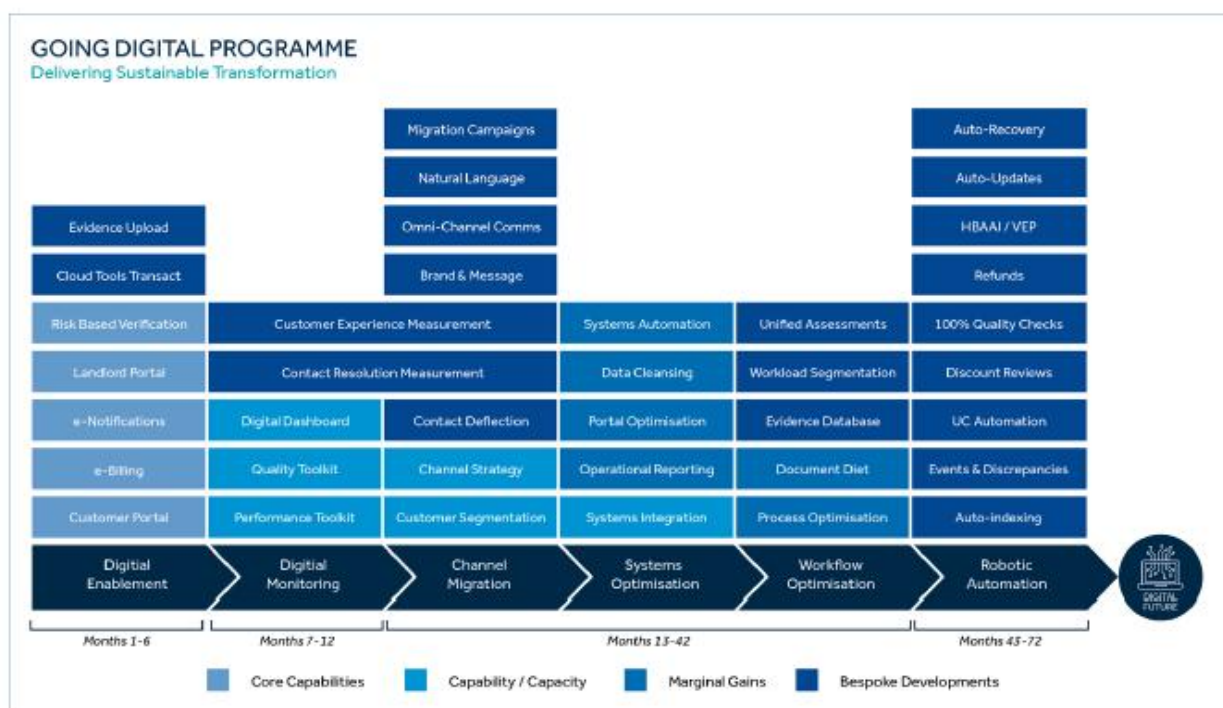
Implementing CloudTools Experience allows the consistent analysis and monitoring of the customer experience through service changes, enabling more effective stakeholder management and decision making in support of service developments. In addition, this typically enhances customer satisfaction whilst ensuring that members and council leaders have a viable feedback mechanism for the residents they serve.

Going Digital Programme

The Going Digital Programme builds upon the use of CloudTools to take services through three key stages of digital transformation over a flexible 12–36-month implementation using a myth-busting, marginal gains approach to improving digitisation through all aspects of service delivery. The key stages are:

- **Digital First** – Focusing on actively encouraging customers to transact using structured channels that are designed to be utilised digitally. This stage will typically deliver 20-25% channel migration over 6-18 months.
- **Digital by Design** – Focusing on actively driving customers towards digital channels where they can transact effectively. This stage will typically extend channel migration to 35-45% from months 6 to 24.
- **Fully Digital** – Focusing on exclusive use of digital channels, but with customer facing teams transacting on behalf of vulnerable customers who are unable to transact effectively themselves. This stage will typically extend channel migration to 70-90% migration over the remaining implementation period.

Each Going Digital programme is tailored to suit the needs of the Council in a number of ways, taking individual building blocks and compiling them into a bespoke programme that uses our Software as a Service solution to deliver sustainable change within individual service lines or across multiple services alike:



This approach considers the four key elements of digital transformation:

- **Toolkits** – The Going Digital programme is toolkit agnostic and can be used with any online toolkit used in government today.
- **Services** – Going Digital can be equally well applied to any service line or combinations of service lines.
- **Demographics** – Where adaptations to the results of analysis regarding the differing needs of each demographic group to ensure that no-one is disenfranchised by the move to a digital service.

- **Pace** – The programme can be implemented over several years (up to 3 years) or significantly accelerated (possibly only 1 year) if the political and organisational will is focused on the achievement of rapid transformation.

As can be seen above, the Going Digital Programme is typically structured into 6 phases, with each phase containing multiple initiatives and workstreams that will be implemented to deliver sustainable digital transformation.

- **Stage 1 – Digital Enhancement:** Building the capabilities within the online toolkit using the Cloud Tools solutions to enable an effective and comprehensive digital service.
- **Stage 2 – Digital Monitoring:** Specifying and building the baseline and monitoring tools used to assess the impact of each Going Digital initiative and the programme.
- **Stage 3 – Channel Migration:** Driving customers towards digital channels whilst monitoring both the impact of each change in approach within the service and staff compliance with the new ways of working.
- **Stage 4 – Systems Optimisation:** Exploiting the capabilities of the core service systems to maximise service performance and productivity.
- **Stage 5 – Workflow Optimisation:** Simplifying workflow wherever possible to reduce customer effort and focus staff time on activities that maximise the use of their skills.
- **Stage 6 – Robotic Automation:** Automating simple elements of processes or even whole processes to remove needless manual effort.

Each initiative within these stages is backed by a clear standard and templates that allows the effective quality assurance of delivery and allows for a consistent implementation across different teams, services and functions.

To ensure that the Going Digital programme fully meets the needs of each client, during the design phase for the programme, our delivery teams will undertake a full-service health check for each in-scope service line to determine the capabilities of the solutions that are in place as well as the operational service culture. This allows our teams to fully customise the delivery programme to maximise the return on investment for the Council in both the Going Digital programme, but also, critically, in the pre-existing investment in core systems.

If required, the service health checks can be procured separately and in advance of the CloudTools or Going Digital solutions to enable Councils to make a fully informed decision regarding the scale and scope of the work required.

Implementation

The implementation of our digital transformation solutions is best considered as two separate, but potential parallel delivery programmes:

- **Cloud Tools Implementation** – Implementing the required software components within each service.
- **Going Digital Programme Design** – Designing a bespoke programme to maximise the Council's return on investment in the core service platforms, by adding and customising the templated building blocks of the Going Digital solutions.

Each are detailed in turn below:

Cloud Tools Implementation

Typically, the implementation of any or all the CloudTools modules is delivered within a month from contract signature to live use in service delivery but can be as rapid as two weeks where Council diaries allow the scheduling of the data capture and training sessions in particular.

Each separate CloudTools module implementation follows the same standard 6 stage path consisting of:

Information capture

In this phase we capture the following data either remotely or on-site depending on the individual requirement:

- Organisation structure
- Users
- Services
- Documents
- Policies & procedures
- Links
- System details

Remote configuration

The configuration data captured is used to populate the different elements of the CloudTools systems and able to provide Council with the relevant login details for each user.

Solution customisation

When a bespoke requirement is identified, it is built into the system post standard configuration. All customisations are fully documented and signed off by each party. This approach ensures that all customisations can be maintained, updated and repeated if necessary.

All bespoke requirements will be charged on a day rate basis.

Train the trainer

Council officers are trained how to use the required elements of the chosen CloudTool(s). The standard implementation includes one user and one manager session, supported by full system documentation.

Depending on the complexity of the requirement, this could be delivered by on-site or webinar-based sessions.

If onsite support is required, we will charge the Council for any expenses incurred. This includes any repeat sessions required by the Council.

Testing

The trained Council officers are required to undertake the system testing to ensure that they can access and use all elements of the required solution.

Issues identified within testing are typically resolved within 2 working days and we will ask the Council to sign-off the system prior to progressing to go-live.

Handover

Once testing is complete and signed-off, we agree the handover date for the solution to go-live.

At the point of go-live our support team will be on standby to resolve any issues that arise. Post go-live we will put in place agreed communication channels for any business-as-usual issues.

Going Digital Implementation

The agreement of the scope and support required to implement the Going Digital programme typically takes one to two months to scope, plan and agree, focusing on the services in question and the specific needs of the client. This will usually run in parallel with the CloudTools implementation.

As a minimum, this would include:

- **Service Health checks** – To determine the systems, configuration and processes used within each service line in comparison to the overall service expenditure and performance delivered. This acts as the baseline for all transformational activity.
- **Programme Design Workshops** – Working with senior officers and service leads to design appropriate channel strategies and transformation action plans.
- **Transformation Metric Definition** – Defining the art of the possible for the post-transformation service based upon industry wide service benchmarks.
- **Technical Solution Definition** – Defining the precise software and service building blocks and their configuration that will make up the Going Digital delivery programme.
- **Business Case Development** – Articulating the business case for change and critically, the benefits realisation strategy to ensure the delivery of the projected return on investment.

Once this is agreed and signed off by the Council's lead officers, the delivery programme will commence in line with agreed timescales.

Implementation Technical Requirements

All CloudTools have been developed to have minimal technical requirements. Across the entire estate of CloudTools the following would need to be put in place:

- **Employee Access** – Relevant employees will require online access to the relevant toolkits and service reporting suites.
- **Scripts** – CloudTools Perform will require 2 scripts to be run daily against the relevant Councils Document Management System. These scripts need to be run overnight and transferred to Liberata.
- **SFTP** – Where there is a need to transfer information and/or data between the Council and Liberata it will need to be done via an encrypted secure FTP connection to the Council.
- **Gov Notify** – We will need to connect to the Councils Gov Notify account to send customer facing e-mails and SMS messages through CloudTools Deflect.

Liberata

For further information on Liberata
and our services please contact us:

2nd Floor Front
60 Cheapside
London EC2V 6AX

+44 (0) 20 7378 3700

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