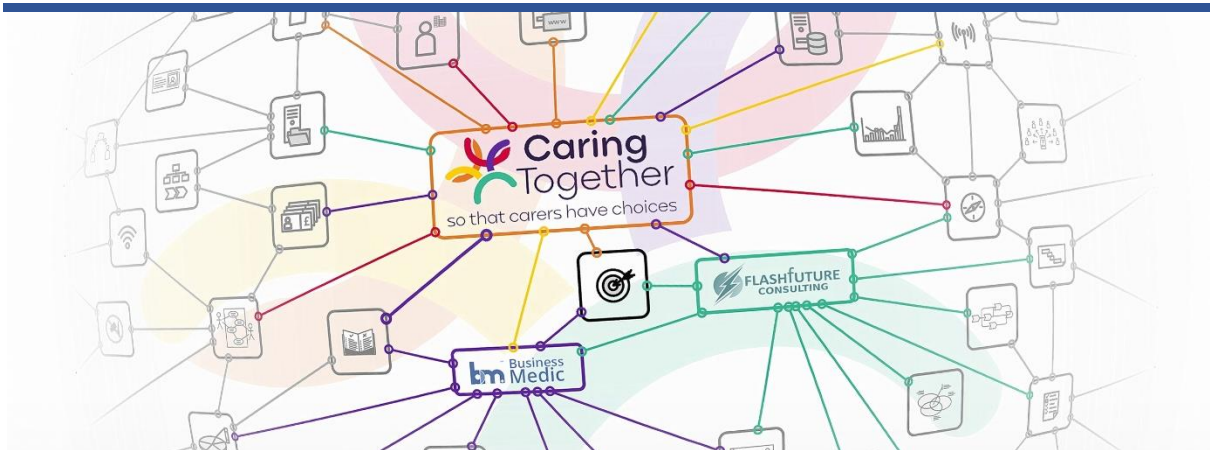


## Caring Together – Becoming a digital charity in 6 steps



### Introduction

In 2018 [Miriam Martin](#) was appointed as the new chief executive to lead [Caring Together](#), then known as Carers Trust Cambridgeshire, Peterborough and Norfolk. She found that she had inherited a highly committed and dedicated workforce and good relationships with local councils and social care commissioners. Furthermore, the charity had a track record of successfully delivering against contracts and enjoyed high levels of customer satisfaction.

However, the organisation still operated on systems, tools and processes dating back to 2004, which were problematic, causing inefficiencies and impacting on the sustainability and growth of the organisation. Something had to be done to rectify this, or the gradual decline would continue. Miriam and the board of trustees decided to take action.

The first priority seemed to be the replacement of the ageing rostering system for care delivery. At the same time, Miriam had the vision that her staff should be provided with a single view of people's interactions with the charity. This, Miriam knew, was essential to support Caring Together's charitable goals. It was also apparent that replacing the rostering system would only deliver part of this vision.

Miriam and her leadership team started to develop a three-year business plan to clarify the charity's vision, objectives, and strategy with defined values and priority areas. This document will not explore those in detail, only the key success points, relevant to the digital transformation.

*Caring Together was an organisation that had outgrown its original, simple systems and had a team of staff who were keen to be supported in the use of better technologies. Access to and sharing of information were the key issues that had to be overcome.*

**Clive Flashman**  
MD Flashfuture Consulting

### 1. Creating momentum across the whole organisation

Right from the outset, Miriam had the essential buy-in from the charity's board of trustees as well as from her staff. Although thought leaders usually describe buy-in as essential, it is undeniably difficult. Sometimes it is impossible due to the size of the organisation (the number of people involved or affected) and more often, it does not represent a true cultural shift in the organisation which is necessary for programmes such as this to succeed.

In this case, staff were involved in workshops to create a three-year plan, representing all levels within the organisation, determining what they felt was feasible to achieve in that timeframe. Caring Together proved that defining a vision and strategy is not an ivory tower activity and that consensus between staff and management is not just desirable but absolutely essential.

Miriam's next task was to put this business strategy into action, and she knew that Caring Together did not have the required skills or knowledge to do this alone. At the same time, she and her senior team had a deep-rooted mistrust of the IT and consulting industry due to earlier personal experiences.

## 2. Seeking the right professional help

Miriam turned to [Clive Flashman](#) of [Flashfuture Consulting](#) whom she had met at a national [Carers Trust](#) event. Clive knows the social care sector, its regulatory frameworks and has held various roles within governing bodies within health and social care. Clive is acknowledged as a thought leader in this domain and had testimonials from other charities to evidence his credibility. Rather than being a technology expert with some knowledge of social care, he has in-depth knowledge of the sector and a healthy knowledge of the available digital options. This seems like a small difference, but getting Clive on board has had a huge and lasting impact.

Clive fully embraced Caring Together's vision and strategy, and he also anticipated all the organisational changes that would be necessary, not just what Apps, services or tools might be required. He suggested the setup of a digital steering group, analysed the organisation's current digital landscape as well as suggesting which current and emerging technologies might be practicable and useful to be applied within Caring Together. There was however one deliverable, which made all the difference. This deliverable provided staff with a better understanding of the potential impacts that digital tools and techniques might have for them personally.

*Meeting Clive was a bit of a lightbulb moment for me. His experience of the sector and methodical and plain English approach to defining a digital strategy and roadmap provided the expertise I needed and could have confidence in.*

**Miriam Martin**  
CEO Caring Together

## 3. Creating compelling narratives

Based on his knowledge and discussions with management and staff, Clive compiled several narratives, which reflected how care workers, carers, volunteers and donors could experience their interactions with Caring Together in the future.

These narratives (some also call them customer journeys or personas) allowed management and staff to validate their expectations or perceptions of the future and to prioritise which of the ideas they thought were most important or urgent.

Furthermore, the narratives were not just useful for buy-in and validation, they proved equally valuable when discussing the potential solutions with vendors, and they can be extended upon in the later stages of an

*I take a people-centred approach. What will make it easier for people to do their jobs, interact with the organisation and receive the services they need? The technology solutions then fall out of that.*

**Clive Flashman**  
MD Flashfuture Consulting

implementation as test cases and for the acceptance of deliverables.

Based on the agreed narratives, Clive created a three-year digital roadmap, which included the replacement of two existing core systems (Care Management and Finance), and the implementation of two new solutions (CRM and HR). At this point, Clive provided another piece of advice, which turned out to be yet another key success factor.

#### 4. Not jumping the gun with vendors

Rather than starting procurement proceedings with solution providers and software vendors straight away, Clive suggested a further and detailed analysis of Caring Together's requirements as well as examining the capabilities of a number of possible vendor candidates for the four new solutions. Clive knew that no software package or cloud service would satisfy all of the organisation's requirements and that a compromise would have to be made between requirements, scope, timing and cost.

Some readers might question the benefit of such analysis and wonder if the work was worth the cost incurred, but it proved to be another success factor.

#### 5. Due diligence beyond digital

Clive introduced his colleagues at [Business Medic](#) to Caring Together, who are skilled at doing just this type of work; carrying out a wider market scan, business requirements analysis and ultimately software selection.

Business Medic considered the initial brief and proposed a scope extension, which Caring Together agreed. As a result, their analysis considered not only requirements and solutions but also the organisation's core and support processes, regulatory requirements, donors' and volunteers' needs, existing systems, core infrastructure and devices, and management functions as well as records, schedules & events, staff training, internal policies and financial information.

During their 'holistic analysis', Business Medic identified many existing pain points from discussions with staff and management. As a result, Business Medic came up with a list of recommendations above and beyond their original 'digital' remit of system replacement and implementation.

Business Medic hoped for and found a welcome reception from open-minded staff, keen to avoid thinking in silos and wanting a broader view of their organisation. For Caring Together, the project was not just about software. It morphed into new ways of working, digitally and beyond. The subsequent selection of the 'right' software became almost consequential.

*Working with Heinz and Kevin from Business Medic was a real pleasure. The key factor in the success of this element of our project was that they took time to get to know and understand us. Their independence from suppliers meant that we could have confidence in the recommendations that were made to us in terms of digital solutions.*

**Miriam Martin**  
CEO Caring Together

With reference to the solution selection, Business Medic provided a high-level design, showing which solutions satisfied requirements and would work together well rather than giving four separate recommendations for solutions with no thought about how they would be used together by staff on a day-to-day basis.

What followed was the procurement of new systems and implementation of the high-level enterprise architecture. This work is still ongoing, but the way Caring Together approached this work points to the last of our key success factors.

*To properly determine Caring Together's system requirements, how they would all fit together and the best ones to use would require a methodical and sensitive approach. I knew that this was exactly the skillset of Kevin and Heinz at Business Medic.*

**Clive Flashman**  
MD Flashman Consulting

## 6. Own your transformation

From the time Clive started advising Caring Together about their digital transformation, he suggested that Caring Together should employ their own dedicated manager to lead it. Caring Together followed his advice.

Many businesses would shy away from such a move, deeming it more cost-effective to commission a contract project manager or another freelancer to do this job as a head of digital transformation might not be a full-time job in the long run. Although this cost argument holds true in some instances, it misses the fact that it is invaluable to have a trusted advisor within your own organisation rather than someone who could potentially be exposed to a conflict of interest between their employer (i.e. the software vendor) and their client (i.e. Caring Together). Using your own person or a freelancer at a higher cost, to fulfil the function of an 'intelligent customer', mitigates this risk.

Caring Together recruited a digital transformation manager and straight away, he set out to deliver on the digital transformation as well as the related recommendations. Essentially, his job is to plan and execute the procurement, negotiate and implement the new systems while 'fixing the plumbing' (dealing with operational issues).

During the early stages of the roll-out of the new rostering system, it also became apparent that the standard vendor training and support was not sufficient for care workers in the field. The COVID-19 pandemic exacerbated the situation.

*When I started, it was obvious that there was a huge potential within Caring Together, but we were being held back by out dated systems and inefficient processes. A lack of management information meant that it was difficult to direct the organisation.*

*A digital refresh would allow Caring Together to deliver higher quality services and provide better support for carers.*

**John Platten**  
Digital Transformation Manager  
Caring Together

This led the leadership team to conclude that not only did they need someone to manage the implementation of the system, but also a manager to oversee the efficient use of the system. For this position, a deep understanding of care management processes was required, and the existing care bookings team manager proved an excellent match for the role.

The new digital product manager was able to validate the implementation, provide highly tailored training and support, and generally act as a super-user of the new care management system.

This approach of having a project manager and a business owner is usually only adopted by larger public sector organisations and corporations. Caring Together made it work for their relatively small digital transformation, and by doing so, have truly owned their digital transformation. The charity has also achieved a good degree of autonomy from its vendors.

## Success so far

Caring Together has achieved significant success in terms of culture change, the way everyone in the organisation thinks about digital. Where staff previously thought about taking paper records and notes, they now look at how technology can help them achieve their vision of becoming a charity that delivers more to its service users. The fear of being forced to use new technology has gone. Caring Together now perceives technology as an enabler to help them to simplify their work.

While some staff had concerns at the beginning of the digital journey, even being fearful about new tools being imposed without their say or input, it has turned out that the same staff now see how their day-to-day work can be supported and improved by the right technology, configured just for them.

A formal benchmarking of changes to performance indicators is currently taking place. Early indications show that there has been a marked reduction in the time it takes to report on care service performance. The benchmarking of other back-office tasks is also underway.

*Very early on in my role, it was clear that the team needed support to use our new care management system, using the real-life information and situations that we have to deal with daily.*

*Having worked with the care team and understanding these day-to-day implications helped me, not only to upskill them but also to feedback to John and the IT team.*

*It's been important to understand and communicate the bigger picture of our digital transformation to the team so that we are all moving in the same direction. This has helped us to deal with some of the teething problems.*

**Maxine Thompson**  
Digital Product Manager  
Caring Together

## Lessons-learned

When asked what Caring Together would do differently if they had to start the digital journey again, a number of things were proposed.

- Proof-of-concept – Before making the final decision for a new system, Caring Together would want to test the system based on their own data. Such an approach would provide a better understanding of how the system and their data would serve Caring Together. Caring Together had considered this option but were put off by the costs – an expenditure that in hindsight they feel would have been worthwhile.
- Take more time 1 – From the outset, Miriam had a specific vision of where she saw the charity in the future. She feels that her discussions about this vision with Clive and Business Medic could have taken place earlier in the transformation process.
- Take more time 2 – More time should have been given before and during the roll-out of the new system in discussing it with care managers and workers. Partly to blame for this was the pandemic, which forced a condensed implementation. The charity believes that a prolonged roll-out period would have been more beneficial.
- ...

- Training – Also partly due to the pandemic, training was mainly provided in the form of YouTube videos. Some staff have found this approach less than optimal, and that interactive classroom sessions would be preferable.
- Business owner – Caring Together now has a digital product manager supporting staff in addition to the digital transformation manager looking after the technical side. The lesson learned here is to have such a digital product manager as soon as possible.

## Conclusion

While 2018 was the starting point of the organisation's digital journey, the main work described in this report took place in 2019 and early 2020. In 2020 there was to be a three-month roll-out of the new care management and rostering system to care workers and managers. Then came the coronavirus.

As preparatory work had been underway in the first months of the year, the planned roll-out was able to proceed. The system has now gone live with minimum functionality after a roll-out period of only three weeks. This compressed period of training, go-live and support, with all managers working from home and care workers on their own in the field was a very challenging time for Caring Together, but they have made the basic system work for them.

Once the care management system is fully operational, other systems will be replaced/ introduced.

As mentioned at the start of this document, Caring Together is still in the midst of their digital transformation and further experience and impact reports will follow in due course.

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*I'm really pleased with the progress we have made so far. It isn't perfect but as an organisation we are now beginning to think 'digital.' Our next steps are to build new functionality into our website and roll out a new CRM system. What's great about all this now, is that it is joined up and we will begin to get our first single view of the individuals we support enabling us to deliver a more tailored and holistic service.*

**Miriam Martin**  
CEO Caring Together