



G-Cloud 11 Service Definition

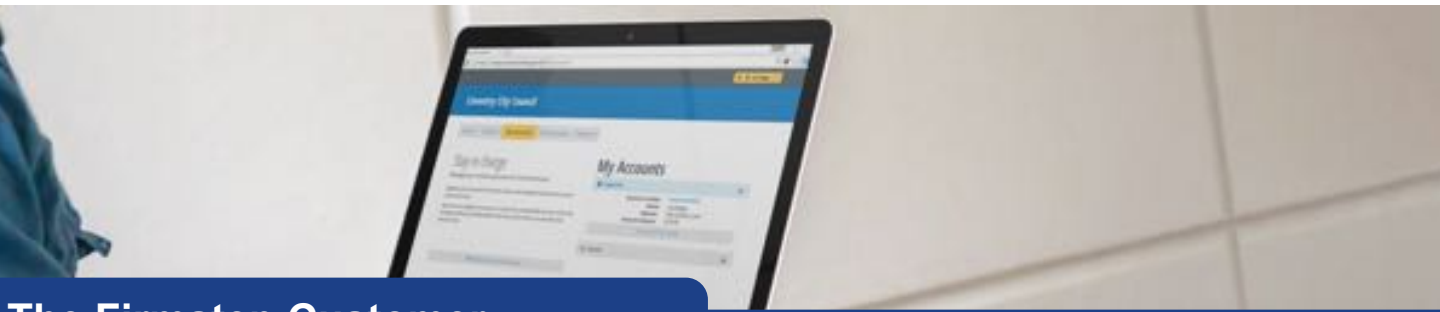
Firmstep Customer Experience Platform

Service Definition

Government Digital Marketplace v11 2019

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The Firmstep Customer Experience Platform

The Firmstep Customer Experience Platform creates seamless and intuitive digital services that drive channel shift and provide the highest standards of customer services which are fast and simple to build. It supports the traditional access channels, whilst also embracing web self-service, mobile, social media and automated bots in addition to new and emerging technologies such as Amazon Alexa. The Platform supports an unlimited range of online transactions, with out-of-the-box support for many transaction types which can be simply enabled as required, in addition to the ability to easily create your own. Transactions can range from simple enquiries, to full end-to-end workflow which involve multiple stages across all internal stakeholders, in addition to external third-party stakeholders (such as contractors or partner organisations). The embedded Integration Manager enables integration at any stage of the request process to multiple back-office systems as well as external integrations to offsite systems. Flexibility is at the heart of the Platform.

The Platform is trusted by over a third of UK Local Government. The central principle of the Firmstep Platform is to provide an intuitive, easy to use and accessible technology solutions. Firmstep's approach empowers our clients with the tools and knowledge they need to innovate and deliver corporate digital transformation. The result is a greatly improved service across all access channels, with minimised operation and ownership costs to the organisation. This allows our clients to continually improve and innovate digitally.

The Platform has been developed by our own, in-house development team in partnership with our UK government clients. This puts Firmstep in direct control of the Platform and its development, ensuring a full ongoing commitment to this sector.

The Platform is provided as a fully scalable 'Software as a Service' (SaaS) solution comprising of a range of modules which can be selected by clients, as required. Hosting is provided on world leading cloud infrastructure from Amazon Web Services (AWS), ensuring outstanding uptime, performance, resilience and failover. All solution updates are automatically provided as part of the service, ensuring our clients are always on the latest version of the Platform without the need to complete expensive and time consuming cyclical upgrades, as is common with traditional solutions in the market.

To help our clients adopt Firmstep easily into their organisation, our project team provide first-class expertise to assist our clients in successfully delivering digital transformation.

The Firmstep Customer Experience Platform consists of four core modules in addition to a large range of optional solutions.

Core Modules

- **Self** - online self-service portal for citizens
- **Service** - integrated contact management solution
- **Forms** - online forms and intelligent workflow
- **Dash** - staff portal



Online self-service portal

Self is the Firmstep Customer Experience Platform's online self-service portal which is transforming the way organisations interact with their customers.

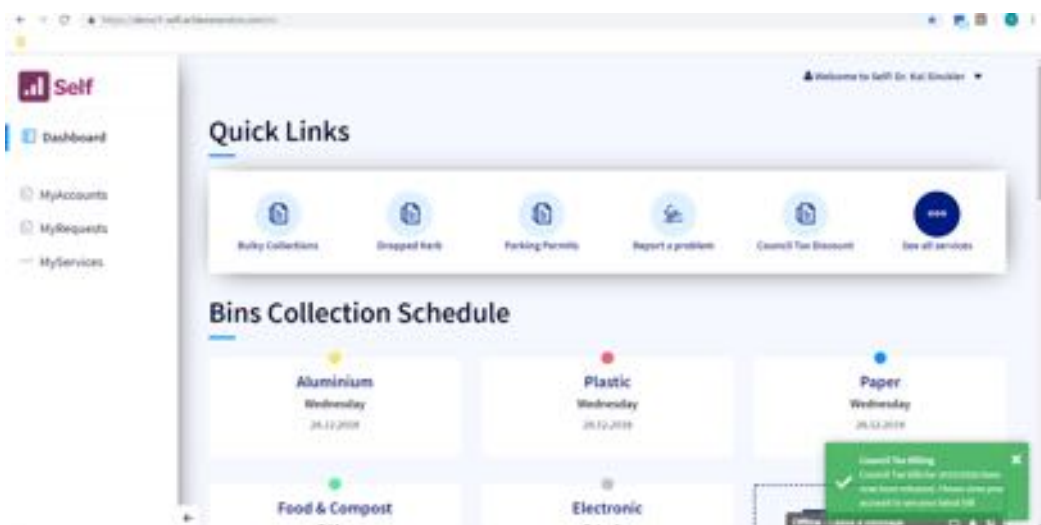
Self drives channel shift and cost savings by creating an individualised one-stop shop, where customers can access your services online - 24 hours a day, seven days a week.

Self is being used by over 130+ UK Local Authorities, and has a proven track record of delivering digital transformation without sacrificing excellent customer service.

Outstanding customer service

Using Self customers can:

- Access information
- Make and track requests
- Complete transactions whenever and wherever they are using either a computer or mobile device
- Save requests and return to the later
- Link multiple service accounts, such Council Tax and Rent and Business Rates, to their Self profile using our MyAccount feature, providing customers with a single place to transact
- Use Single Sign On to securely share authentication with other portals

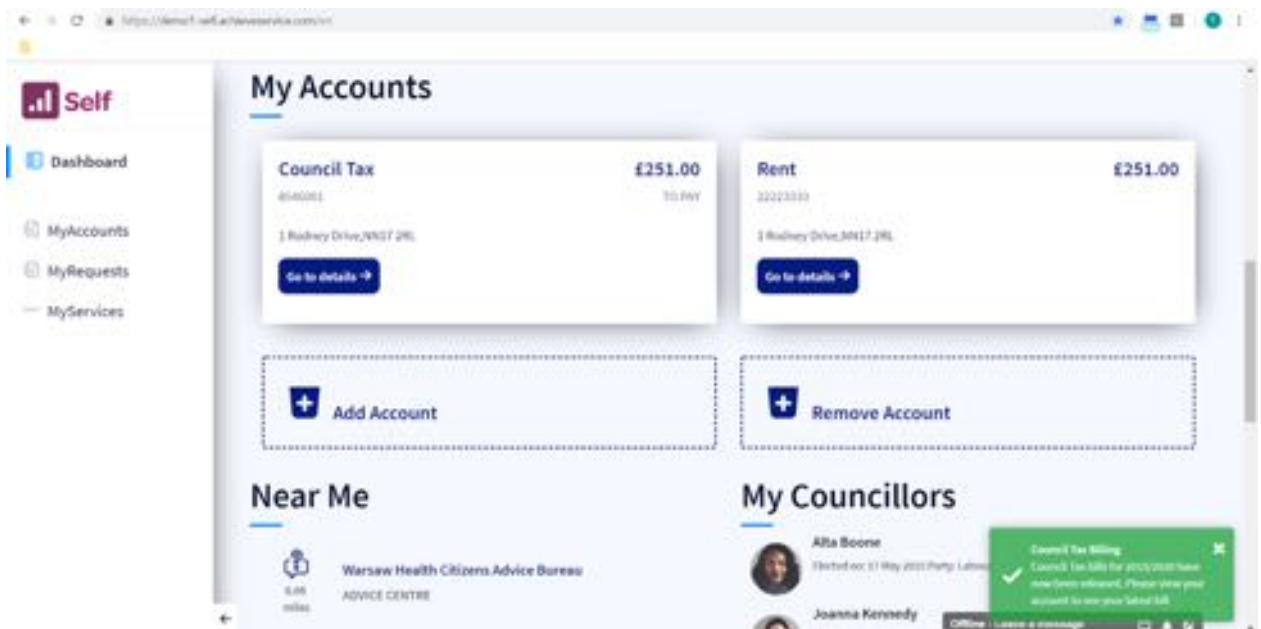


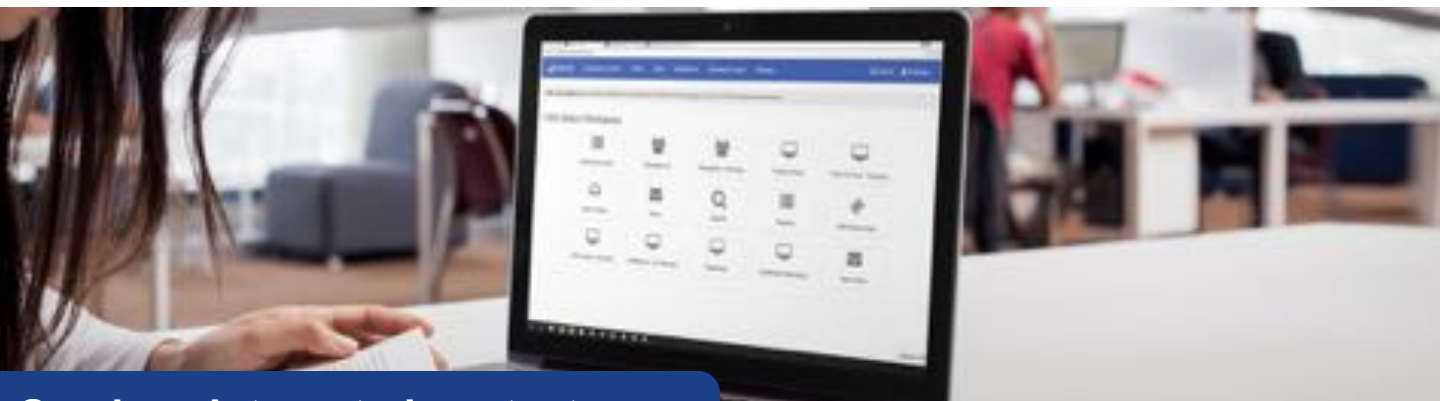
Seamless flexibility

- Adaptive design - Self can look and sound exactly like your static content
- Optional accounts - Self's flexibility gives you the power to decide which requests require an account
- Multiple languages - depending on your needs, multiple languages can be added to all content or just a single version of a form
- Easy integration - Self seamlessly integrates with internal and external back-office solutions, such as payment gateways and verification solutions, ending duplication and driving the efficient use of staff time

An end to duplication

The single customer index is the Firmstep Customer Experience Platform's ground-breaking solution which prevents duplication of data and, most importantly, gives your staff more time to focus on their frontline activities.





Service - Integrated contact management solution

Service

Service has the power to transform the way you do customer service. It delivers the cutting-edge functionality and administration customer service staff need to handle telephone, face-to-face, email and social media interactions on one single platform.

Designed with and for Local Government, Service is the most-trusted mobile ready CRM alternative in the sector. Over 90 UK authorities are using it right now to provide outstanding customer service, drive efficiencies and continue their digital transformation.

Customer information at your fingertips

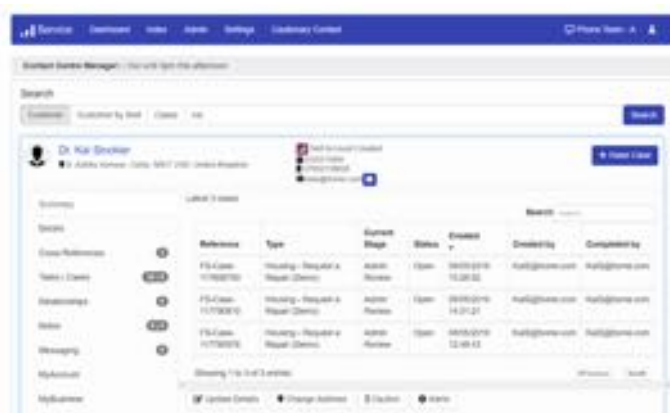
- 360 view - the customer index provides staff with a global view of a customer by showing details of every interaction made across all channels
- Single search field - Finding someone fast is easy with Service
- Seamless integration - Staff can access information from requests that have already been pushed into other third party back-office systems
- MyAccount - Personal account information, such as rent, council tax, benefits and business rates balances, can be displayed to staff
- MyAccount solution, enabling them to provide a first-class service to your customers through a single customer record
- Cautionary contact feature - If a customer is deemed to pose a risk to others, this feature can be used to flag their record with a warning for other staff to be careful. No other provider makes protecting your staff this straightforward.

Requests made easy

Unlike some traditional solutions in the marketplace, the Firmstep Platform enables you to build and utilise a single request type across all contact channels so staff using Service can often complete the same form a customer would be using in Self.

This unique approach:

- Dramatically reduces development time and costs
- Reduces staff training requirements
- Increases consistency for customers as they receive the same service across all contact channels



Service - Integrated contact management solution

Multiple workspaces

Service's market-leading capabilities allow the creation of multiple workspaces which can be used for different contact types, locations and teams. Workspaces can be tailored according to your needs and are designed with a consistent layout to support staff switching between roles in multi skilled customer service environments. Wrap up screens across all workspaces allow satisfaction to be recorded while self-service invitations enable the option to provide assisted channel shift to online services. The solutions workspaces include:

Phone Team: The solution can integrate with telephony systems to identify the customer record from their telephone number and even populate the reason they are calling based upon the IVR options selected or the access number dialled. Once identified full access to the customer is provided to log and track queries. Comprehensive knowledge base articles and quick query functions are also accessible.

Reception: Screens allow reception staff to handle face to face enquiries with full access to customer records to log quick queries, record general enquiries and queue customers for service specialists using the optional queuing system.

Our optional Kiosk solution drives further efficiencies in reception environments by providing the following services using a tablet device:

- Self-Serve
- Scan and drop documents
- Queue for assistance (Queuing Solution)
- Check-in for pre-booked appointments

Face-to-face: Service specialists can view who is waiting for them using the skills based queuing solution in addition to viewing queue notes and any alerts placed against the customer e.g hearing loop required. Staff can call tickets using the optional wallboard screens and serve customers using the customer records which are automatically presented to them. Re-queue and re-call functions provides maximum flexibility within busy reception environments.

Inbox: Empowers staff to process inbound email, SMS and tweets, as well as feeds from other social media services in a single integrated workspace. The solution has been designed to improve efficiency across these channels with automatic identification of the customer record based upon the email address or social media identity. Quick responses can be selected from a predefined list and cases can be directly raised with the message presented next to the enquiry form. Both the incoming message and any reply sent back will be saved against the customer's record to provide a full audit history.

Reporting

Monitoring workflows, customer satisfaction ratings and other key performance indicators is quick and simple with Service. Our suite of complementary native reports is there for you to use and with full access to all platform data, custom reports can be created in minutes using your reporting tool of choice.



Forms – Online forms and intelligent workflow

At the heart of the Firmstep Customer Experience Platform, Forms powers the creation of easy-to-use forms and workflows which not only span the Platform but also extend to third-party organisations and contractors.

Simple to use

Forms makes digital transformation easy. The solution's intuitive, graphical design guides you through the process of creating, publishing and maintaining your forms. No coding or specialist skills are required.

Configuring the Platform is also straightforward thanks to the accessibility of the administrative screens.

Seamless integration

Our market-leading Integration Manager drives the easy, real-time, two-way integration of data captured across the Platform with virtually any internal or external back-office system.

To date, the Firmstep platform has been integrated with over 100 well-known service providers, including: Uniform, Flair, Mayrise, Symology, Confirm, Bartec, Whitespace, iWorld, Academy, Gov.Notify and Gov.Pay and many more.

Unlike many other providers, we do not charge for integrations. Instead we give you the tools you need to create your own. Over 70% of clients build their own integrations in house.

Forms – Online forms and intelligent workflow

Quick and easy payment collection

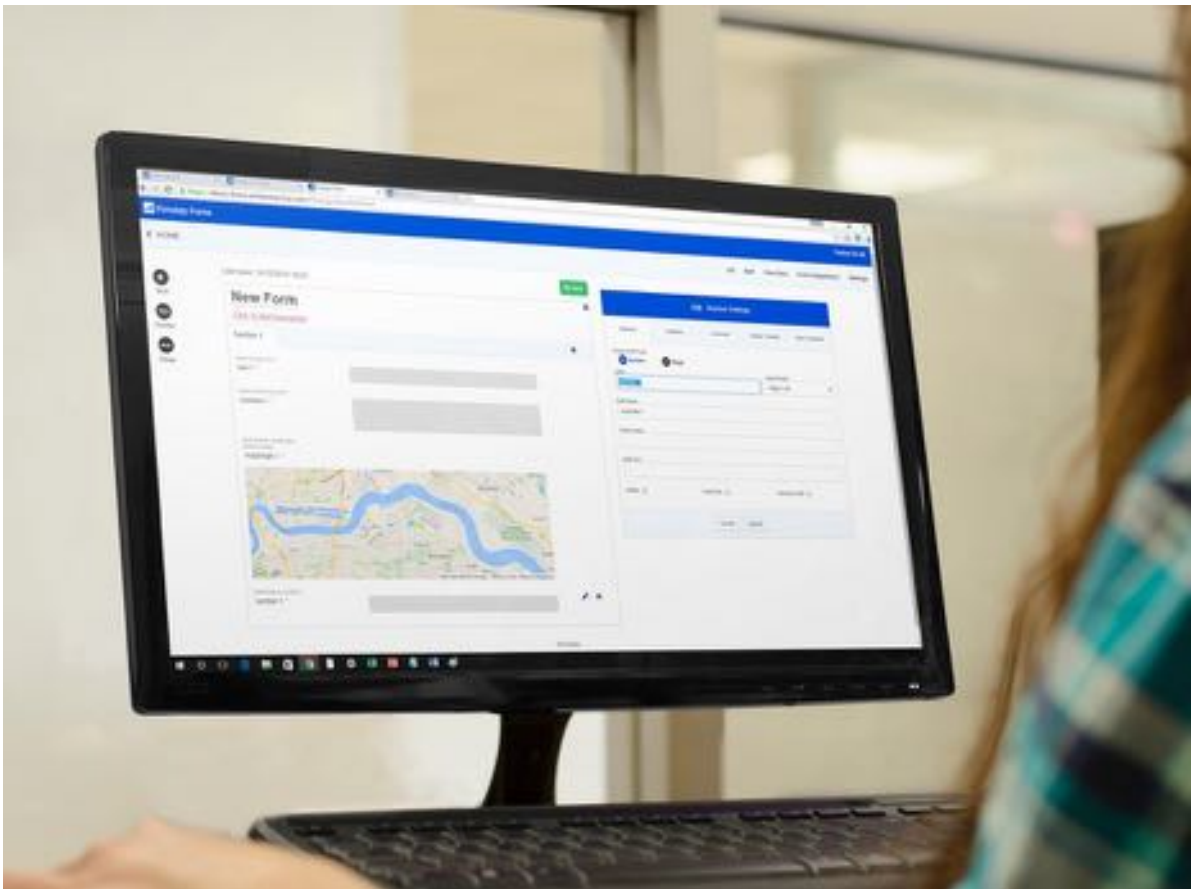
Our managed payment connector is the smarter way to take payments and is included as standard with Forms.

Once a customer has finished completing a form which requires a payment, such as requesting a new garden waste bin, they are automatically connected to your payment portal. Forms's powerful capabilities allow information such as customer ID, payment amount, budget code etc to be shared so customers only have to enter their payment details. There is no time wasting and no duplication.

First-class user experience

The forms and workflows created by Forms provides your customers with a range of benefits which include::

- Mobile optimised experience - customers can complete forms using a computer or mobile device
- Intuitive design - the forms' easy-to-use format takes users through every step
- Enhanced experience - extra features such as video or audio can be included if required and pop-ups can also be added to show when fields are completed
- Personalised confirmations - email and SMS notifications can be configured, personalised and fully automated
- Instant feedback - using the Platform's five-star rating system, customers can rate your performance instantly at the end of a form as well as complete an optional survey once the request has been completed





Dash – Staff portal

Dash, the Firmstep Platform’s staff portal, is the smart solution to making your organisation work more efficiently, and it is included as standard with the Platform.

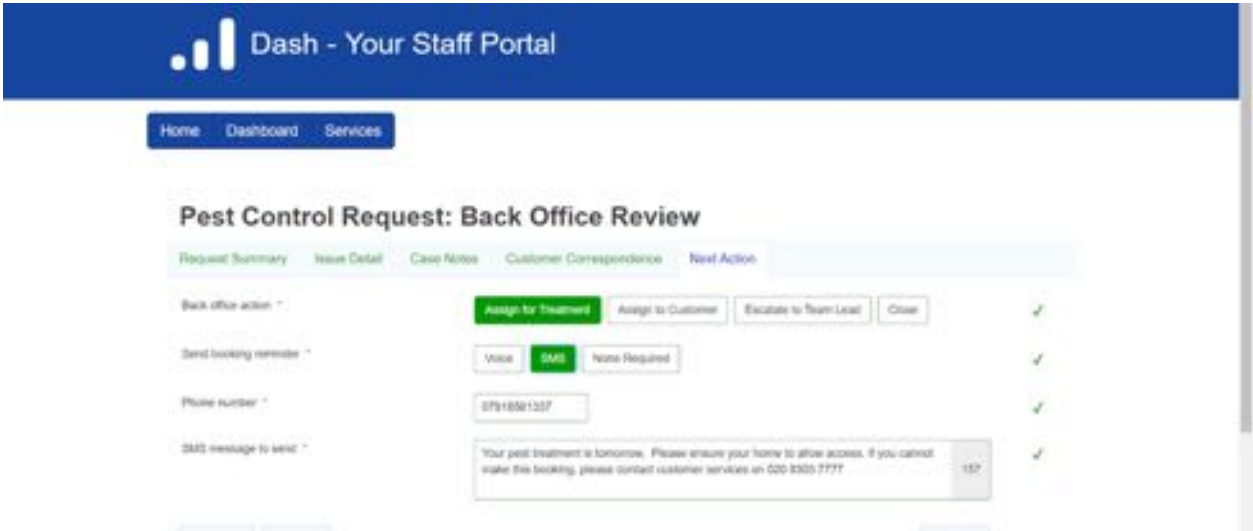
Accessed using a computer or mobile device in the field, Dash pulls information from across the Platform, giving staff quick and easy access to assigned workflow tasks as well as streamlining the process for logging internal requests using the same forms and workflow technology.

Dash together together the platforms workflow capability really drive efficiency, and accuracy of digitalisation.

Internal workflow

As soon as a request is logged in the Platform via modules such as Self, our customer self-service portal, the request is assigned automatically to the relevant staff member or team for actioning through their Dash dashboard.

Once a request is picked up, Dash’s intuitive interface gives staff details of the request and what actions need to happen next. All actions in Dash are tracked providing a full audit of events while SLA’s and escalations can be set to ensure requests are completed within the required timescales.



Dash – Staff portal

When an action is completed, the request seamlessly progresses to the next stage of the process. This could mean assigning the request to another team in Dash, passing it back to the customer in Self, assigning it to another module in the Platform or even pushing it into a third party system using the platform's Integrations Manager. Workflow stages can also be completely automated if required, giving your staff more time to focus on higher-value tasks.

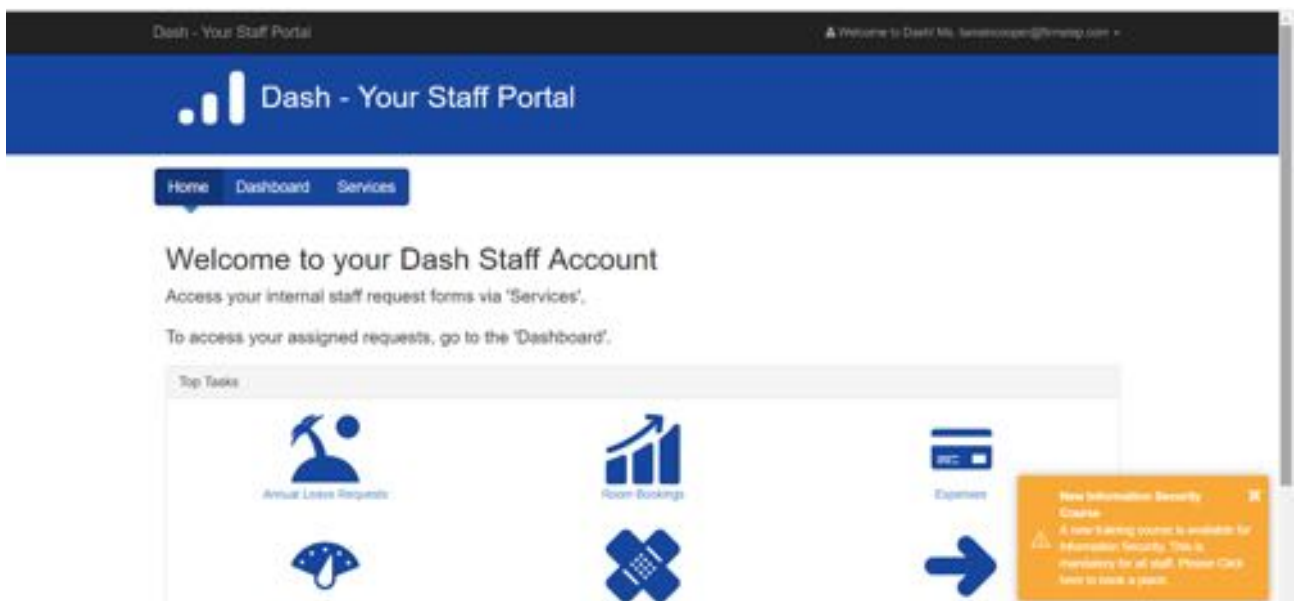
Logging internal requests

Dash delivers further cost savings by enabling the Platform's powerful forms and workflow solutions to be used for any type of internal process, such as room bookings, job applications and the process for recording sickness rates.

The number of processes you can add to Dash is limitless, and, once they are built, your staff can access and submit requests to them through their personal Dash account.

The benefits:

- **Workflow** - Provides workflow capability across the organisation enabling joined up working across different departments. Options to extend this workflow out to external parties such as partner organisations and contractors
- **Drives efficiencies** - Automation, mobile optimisation and easy integration with back-office systems reduce duplication and ensure actions are dealt with quickly
- **Designed for you** - Permissions, actions and what staff can see are all configurable depending on your needs
- **Easy reporting** - Every action made through Dash is audited, making performance monitoring exceptionally straightforward and giving you a 360-degree view of workflow





MyServices

The Firmstep Platform contains over 100 pre-built council services ready to go-live at any time. MyServices is available as a subscription or as part of Forms license. MyServices are turn-key, standardised, best practice processes which centrally managed but still can be configured to meet local requirements.

Each MyServices includes a process workflow that supports the common business requirements as well as an associated configuration form where you can specify local settings such as pick list values, help texts, payment options, notification emails, integrations and permissions. Based on the permission settings, the MyServices once submitted can be routed using the predefined inbuilt workflow to back office teams using Dash and/or externally to partner organisations using Shared Digital Workspace where the request can be securely reviewed and /or actioned.

The Platform's dedicated MyServices portal, allows authorities to view the range available and preview or test them. If you wish to switch one on, it's simply a case of selecting the process in the site administration and completing the required configuration. Once completed they are ready to be published – it is that straightforward.

MyServices offers a way to speed up the implementation and unlock savings in areas you are not yet exploiting. It provides a quick and easy way to rapidly digitise your services.

MyServices Premium

MyServices Premium offer authorities a range of optional, comprehensive, end-to-end applications. These applications have been developed in partnership with several authorities to ensure they meet rigorous user requirements. Like MyServices, they are turnkey solutions which can be rapidly configured and deployed.

MyServices Premium applications are licensed individually and include all relevant Platform modules, allowing them to be taken as completely standalone applications. They offer a proven alternative to authorities building their own solutions, helping to save both time and money while improving the overall citizen experience.

The Premium MyService applications currently available are:

- Report It
- Contact Us
- Freedom of Information (FOI)
- Blue Badge
- Bin Collections
- Disabled Facility Grants (DFG's)
- Homelessness

Report It

An application for reporting environmental issues across both self-service and mediated channels. Typical examples include pot holes, fly tipping, and graffiti, in addition to any other type of location-based issue. The solution is fully mobile responsive allowing it to be used on smartphones and tablets at which point GPS can be utilised to detect the user's location on the map. Existing requests are displayed back to the user allowing them to see if an issue has already been logged, helping to prevent duplicate requests from being raised. Where existing requests are found, users can optionally attach themselves to the request for updates.

Once logged, Report It assigns tasks to back office team/partner for review and action. Citizens are automatically kept updated on the progress throughout.

Report It can be easily configured by authorities where request types guidance text, help text, emails, integrations and permissions can all be defined.. Where authorities wish to push environmental cases into back office systems, Report It's integration capabilities allow this to be added.

Contact Us

Contact us is an application for receiving feedback across both self-service and mediated channels. Typical examples include comments, compliments and complaints. When making a request, users are first taken to a signposting screen which aims to identify if the user is seeking to make a service request, such as a reporting a missed bin. If this is the case the user is sign posted to the appropriate service preventing an incorrect Contact Us request from being made. Where none of these apply, the user can proceed and enter the request details.

Once logged, requests are assigned to the back office team for review and action. Citizens are kept updated on the progress of their request throughout the process via notifications at key milestones. The back-office workflow will typically follow these key stages:

- Triage
- Investigation
- Review and Response

Contact Us can be easily configured by authorities where request types guidance text, help text, emails, integrations and permissions can all be defined. Multiple sets of SLA's can be configured in line with the authority's current requirements. Escalations and reporting options help ensure requests are resolved within the required timescales.

Contact Us provides a single door for all feedback across the authority, removing silo-based approaches and helping to ensure a consistent, performance based service is delivered.

Freedom of Information (FOI)

The FOI solution seeks to remove any avoidable contact by first directing the user to search the FOI disclosure list for similar requests. Where a similar request is identified, the user can open the request and view the disclosure details. Where a request cannot be found, the user can proceed and enter the required details.

Once logged, requests are assigned to the relevant back office team for review and action. Citizens are kept updated on progress throughout via notifications at key milestones.

MyServices

Once complete, citizens are notified of the outcome of their request via selectable templates which can be customised with the request details. The authority can additionally define if the request should be published on the disclosure log.

The solution includes a range of features such as the ability to delegate requests to back office teams and for individual tasks to be set and assigned to multiple contributors for action. Options for approval, excessive requests and appeals are also included.

FOI can be easily configured by authorities where request types guidance text, help text, emails and permissions can all be defined. Multiple sets of SLA's can be configured in line with the authority's current requirements. Escalations and reporting options help ensure requests are resolved within the required timescales.

Bin Collections

Bin collections provides a comprehensive solution for the management and reporting of missed bins. The solution includes a home screen widget for Self which displays real-time collection and scheduling information to help keep citizens updated on their next collection date and any delays in service directly from their account home screen. This reduces avoidable contact.

When making a bin collection request via the included process, the solution uses the same information for avoidable contact checks to confirm the citizen is not reporting a bin on the wrong collection day or a bin that has not met the authority's criteria such as being contaminated, not placed out on time etc. If the required criteria aren't met, appropriate advice is given on the reason and alternative options (such as visiting a waste reception centre) are presented.

Citizens are kept updated on the progress of their request throughout the process via notifications at key milestones. Bin Collections also provides screens for back office staff/collection allowing them to report bins which did not meet the authority's collection criteria (e.g. contaminated). Once entered, they are immediately available to the rest of the application and will prevent a request from being logged.

The solution will hold the authorities full bin collection rounds which can be managed via a range of back office forms with config options including:

- Route setup
- Schedule setup
- Special Routes
- Exceptions – i.e. bank holidays

Integration with third party back office systems to pull route and round information is also possible. Bin Collections can be easily configured by authorities using the forms mentioned. As with all MyService applications, a range of admin screens allows councils to easily configure general settings for the service which include text/guidance, notification and permissions.

Blue Badge

The Blue Badge solution streamlines the application, renewal, cancellation, and appeals processes. This reduces administration costs, standardising and automating eligibility assessments and improving the citizen experience. The entire process can be managed online. Intelligent forms automate eligibility decisions based on national criteria. Our Shared Digital Workspace enables Councils to securely extend the process to work with external assessors where required whilst being integrated with the national Blue Badge system allows approved applications to be pushed directly into the DfT for badge issuing.

MyServices

Our multi-channel Blue Badge MyService offers:

- Blue Badge application forms for renewals, cancellations and appeals
- Full end to end processes
- Automated eligibility decisions
- Document upload capabilities
- Online payments
- 3rd party referral forms
- Integration as standard into DfT's national Blue Badge System
- Optional ability to securely extend the process to external eligibility assessors where required

The solution enables citizens to assess whether they are likely to meet the eligibility criteria prior to applying, managing demand and expectation. All mandatory information is captured upfront, including declarations, evidence document uploads and a photo while relevant payments can be taken online.

Disabled Facility Grants (DFG)

The Disabled Facility Grants solution provides a comprehensive solution for managing DFG applications. Case management actions and data are coordinated securely across organisational boundaries to make seamless, joined up, local service delivery a reality.

Developed hand in hand with Health, Housing and Social Care, the solution is a digital enabler for collaborative working across relevant agencies including Home Improvement Agencies, and Care and Repair services, driving real citizen focus into the design and delivery of services and accelerating delivery time for essential aids and adaptations.

The solution is a self-service application that allows direct requests to be made by citizens or those acting on their behalf, in addition to referrals from the relevant professional. The DFG forms have been designed to be easy to complete and to collect as much information as possible at the first point of contact. The needs and circumstances of the user can be fully recorded, and the intelligence built in provides an eligibility determination. That includes indicative means test based on grant criteria that will highlight if an applicant is likely to have to contribute towards the cost of the adaptation.

Applications are intuitively assigned to the relevant social care team for review using Dash. The review stage will authorise progression to an Occupational Therapist (OT) assessment or triage the applicant to other appropriate services.

The OT assessment can be completed on a mobile device and will confirm if an adaptation is necessary and appropriate, providing recommendations and specifications of the adaptation required to meet the applicant's needs. This will be automatically referred to the housing provider responsible for managing the next stages of the DFG application. This referral can also include options for other services such as a feasibility study or privately funded works.

Homelessness Prevention

Homelessness helps authorities act quickly to prevent and reduce homelessness. It supports early intervention approaches by providing more meaningful assistance to all people who are eligible, homeless, or threatened with homelessness, irrespective of their priority need at the first point of contact.

Eligibility and need can be assessed against the criteria within the homelessness legislative framework. This accelerates response and service delivery and minimises manual administration. The solution manages referrals, self-assessment eligibility checklists, and professional tools for managing full applications that include investigations and assessment of needs.

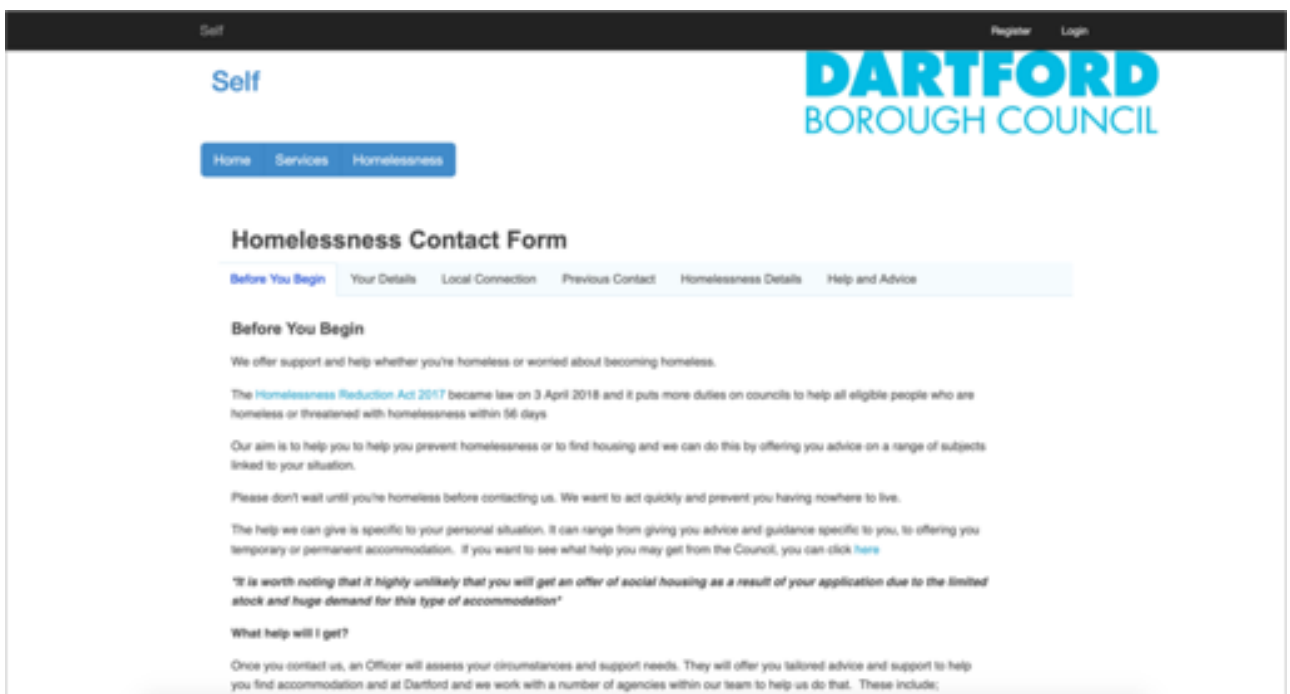
Homelessness can be configured to provide integral advice and guidance based on the information provided by an applicant and signpost or refer to other appropriate support agencies and services. This promotes self-service and self-sufficiency, helping to manage citizen expectation and demand.

The data recorded can be utilised to automate documents such as Personal Housing Plans which can be downloaded as a PDF if necessary. Automatic communication and homelessness notices based on the assessment can be sent to applicants via emails, texts, or their online Self account.

The solution provides secure workflow to not only reduce organisational silos and provide seamless services delivered in a coordinated manner, but also to support collaboration and genuine multi-agency working. Support services and actions can be coordinated across different agencies to create holistic Personal Housing Plans that set out the steps that are being taken by both the applicant and the authority to ensure accommodation is secured and or retained.

The application enables officers to record information and evidence about the circumstances that have or will cause homelessness and about the care and support needs of the applicant and their household. Information and plans can also be shared with partner organisations through the Shared Digital Workspace.

Data captured fully complies with the 2018 H-CLIC DCLG reporting requirements



The screenshot shows the 'Self' account interface for Dartford Borough Council. The header includes 'Self' on the left and 'Register' and 'Login' on the right. Below the header is a navigation bar with 'Home', 'Services', and 'Homelessness'. The main content area is titled 'Homelessness Contact Form' and has a sub-header 'Before You Begin'. The text explains the council's support for homelessness, mentioning the Homelessness Reduction Act 2017 and the council's aim to help prevent homelessness. It also includes a note about the limited stock of social housing and a link to 'here' for more information. The form is currently on the 'Before You Begin' step, with other steps like 'Your Details', 'Local Connection', 'Previous Contact', 'Homelessness Details', and 'Help and Advice' visible in the sub-header.

In addition to the main modules detailed above, the Platform has a range of high value additional modules which can be enabled to provide further features and benefits to your Platform investment.

Calendar Bookings

Local calendar integration features allow authorities to add live bookings into their forms and processes, for both citizens and staff. The calendar feature integrates directly with calendar providers such as MS Exchange and Google, allowing availability to be queried and presented back to the user for selection. Several calendars (team 1, team 2 etc.) can be integrated with the form selecting the appropriate calendar automatically based upon the user's input such as the request type, location, or other information collected.

Upon selection of a slot, a temporary reservation is placed in the calendar to hold the slot while the user finishes completing the form and makes any payments which may be required. If the user quits the process, the calendar slot will be released for other customers to use. If the user completes all the required steps, the slot will be changed from temporary to permanent with appropriate details written into the booking such as the user's details and the request type. Confirmation emails and SMS messages can be sent upon completion as well as other key events such as a reminder 1 day before the booking is due.

Additional functionality can be added on a process by process basis such as the ability to reschedule the booking and any linked restrictions or additional payments which may be required.

Common booking processes include:

- Booking home visits, i.e. pest control treatments, special collections
- Booking appointments with specialists, i.e. housing, environmental, social care and registrar teams
- Booking testing sessions, such as MOTs
- Booking resources, i.e. equipment, pool cars, catering etc.

Self

Dashboard

MyAccounts

MyRequests

MyServices

Welcome to Self! Dr. Kai Simckler

Pest Control: Log Request

Booking Information Customer Details Treatment Costs Pest Location Appointment Additional Services Summary

Please select a date for our pest control team to visit and complete your treatment. A payment by credit/debit card will be required to secure your booking.

Bookings are non-refundable but can be changed up to 24 hours before your appointment by logging in your online account. Alternatively changes can also be made by contacting customer services on 020 8303 7777 who are available 9am - 5pm Monday to Friday.

< Wed 15 May Thu 16 May Fri 17 May Mon 20 May Tue 21 May Wed 22 May >

PS118923829

Next >

Cancel < Previous

Firmstep Demo Chat

Other platform modules

MyAccounts

The MyAccount feature provides citizens and CSAs with direct access to a range of personalised accounts held with the authority such as Council Tax, Benefits, Rent and Business Rates.

Traditionally, these accounts would be presented to customer service staff by a back-office system requiring access to that system and training. For citizens it typically would require access to another third-party portal with an additional online account or the service was simply not available online.

MyAccount allows both staff and citizens to access these accounts directly within the Firmstep Platform. For citizens, they can login to Self and quickly add the required accounts through a real-time verification process. Once added, the account is always available to view. Similarly, if the citizen makes contact via a mediated channel, customer service staff are now able to access their account within Service. Vice versa, staff can add the account into Service during a mediated interaction, such as a phone call, at which point the account will immediately become available to the citizen to view online in Self.

MyAccount is compatible with an extensive range of back office system providers including Capita, Civica and Northgate where data can be pulled from and presented to the end user. While Council Tax, Benefits, Rent, and Business Rates are the most common MyAccount which have been completed many times, the feature has been built in a generic way allowing it to be used for any type of service which requires additional authentication mechanisms, such as Commercial Rent, Commercial Waste and Landlord accounts.

SSO (Single Sign On)

The Platform's optional Single Sign On (SSO) feature allows the Platform to be integrated with other third-party portals for authentication. We provide two levels of subscription covering the complex Revs, Bens and Housing services where a MyAccount is not used and also a lower cost option for other portals which are considered simpler.

Traditionally, the Platform's features including MyAccount are used to replace many existing self-service portals to provide the authority with an enhanced single portal solution at a lower cost of ownership. Where the authority wishes to keep an existing third-party portal or even implement a new one in future, the SSO option allows that third-party portal's authentication to be combined into the Firmstep Platform. The result allows a Citizen to not only log into Self and access the full range of services and capabilities the Firmstep Platform provides, but then at appropriate points be transferred from Self into a third-party portal. Once SSO is in place, the transfer is seamless; no further authentication details need to be remembered or used.

Citizen Mobile App

Citizen Mobile provides citizens with a mobile app which is available for both IOS and Android through the associated app stores. Through the app citizens are able to log into their existing account or create a new account. Account data will be automatically pre-populated into requests saving valuable time while existing requests can be tracked regardless of the channel they were logged by (mediated or self service). Location based services can be utilized to pinpoint the user's location for geographic based request e.g. reporting a problem, while push notifications can be used to update citizens on changes to request status as well as generally for proactive outbound communications. Once a request is logged it utilises the platform's single customer record and becomes available to the user to track not only in the App, but online within their Self account and on mediated channels via our Service module.

Other platform modules

Clients can choose from a range of pre-built services to activate in the Citizen App as well as publish their own services built using the platforms Forms and Workflow tools. These can be existing services already shared across multiple contact channels such as our Self and Service modules or new services built specifically for the Citizen App.

Clients are able to customise the Citizen App with their own icon, logo and colour scheme to match their existing corporate identity.

System Polling Solution (SPS)

Firmstep's System Polling Solution (SPS) tool is available as an option for clients who require advanced integration capabilities to make up for certain deficiencies or limitations in mission critical high volume transactional 3rd party business systems. Typically many of these legacy solutions simply do not have the ability to initiate push integrations, preventing them from pushing case updates back to external systems such as the Firmstep platform.

SPS was developed so clients can instead schedule cyclic update queries with these third party systems allowing a status check to be initiated periodically e.g. poll every 15 mins for an update. Once SPS identifies the request has changed state, the update is pulled back and pushed into the Firmstep platform at which point the existing request is updated and progresses onto the next stage of its defined process.

In addition to polling, SPS offers enhanced queue and control capability of outbound integration requests. In these instances, requests to third party systems can include scheduling configuration which defines how a request should be processed. This can for example offer the ability to easily schedule integrations but also the ability to queue integrations should a third party system be unavailable.

govDelivery

govDelivery is our digital subscription management solution. It's the only digital marketing platform built exclusively for public sector organisations and is designed to promote usage of online services, enhance public awareness, and increase the contributions and involvement of citizen communities. That enables clients to utilise marketing automation, advanced electronic newsletters and the ability to provide highly granular updates to the content they publish online.

govDelivery also provides digital notifications newsletters, bulletins and proactive alerts to a network of over 14m UK citizens using digital channels including, email, SMS, RSS and Social Media. Offering proactive public communications allows clients to quickly, efficiently and effectively reach a very large and highly engaged, responsive audience whenever necessary.

The more people you can reach with highly targeted digital messages the greater the likelihood of a positive outcome. With 14m UK citizens already subscribed it is the perfect platform to digitally build citizen relationships and your understanding of the communities. govDelivery is available to purchase from Firmstep under a dedicated entry on the G-Cloud Software lot.

govDelivery - Enhanced Citizen Subscriptions

govDelivery ECS allows citizens to view and signup to marketing from their Firmstep self-service account as both a new or existing customer. Customer Service Advisors can similarly collect preferences as part of a mediated transaction within our Service module. Providing maximum flexibility, marketing preferences can additionally be inserted into forms and processes allowing a citizen to be presented with related content as part of a service request e.g. when reporting a missed bin, the citizen can subscribe to receive govDelivery notifications on bin collection changes.

Other platform modules

In addition to direct integration there are options to utilize splash screens to capture preferences on particular pages as well as directly embed a govDelivery widget. Firmstep would be happy to discuss the options available to meet your local marketing needs.

Offline Forms

The Firmstep Platform's workflow modules such as Dash and the Shared Digital Workspace are fully mobile responsive, allowing them to be used by staff in the field for mobile working on both tablets and smartphones. The app-like feel delivers a first-class experience without requiring the authority to invest and maintain a separate set of device dependent mobile apps.

However, these modules are online modules which require the user's device to have a data signal. While we have many authorities using our Platform in this way we also have a number who suffer from limited mobile network coverage and have several service blackspots. The Platform's optional Offline Forms module has been built in partnership with other authorities to specifically solve this issue. Offline Forms allows users to synchronise their device when they have an internet connection such as at home, in the office etc. and once finished work offline with no dependence on mobile networks. Staff can access all tasks assigned to them and even log new requests such as completing an inspection or survey all without a signal. Once back in reception, devices can be synchronised, pushing completed work back into the Platform and onto the next stage of the process. Offline Forms works seamlessly with the Platform and with your existing processes making implementation a breeze. Forms, processes and integrations do not need to be re-built to work with as is the case with many solutions out in the market. Offline Forms is also device independent, working on modern smartphones and tablets.

Chatbot / Web Chat

The solution enables councils to add web chat capability to their online presence. Our web chat solution integrates with our Self portal allowing customers to start a conversation from a relevant page. Web chat can also be embedded within your own site(s) where required.

Where traditional web chat would simply route the request to an adviser for assistance, Firmstep web chat is able to harness new and emerging chatbot technology to automate many simple transactions from general information and signposting, to logging a service request. As an example, when a citizen starts a web chat regarding their missed bin, our chat bot will automatically provide details of the council's bin collection policy and request further details such as the citizen's house number and postcode. These details are used to cross check against council waste data to ensure the citizen is reporting the bin as missed on the correct day and the bin has not been tagged as contaminated, late etc. If the bin was tagged, the citizen would be advised appropriately by the chat bot and sign posted to other options such as to visit a local refuse and recycling centre.

Where the citizen is permitted to report the bin as missed, the chat bot can request the required details and initiate the service request in the background within the Firmstep Platform. This allows the request to be fully automated providing efficiencies as well as customer service improvements. Alternatively, the chatbot can also sign post the customer to your online missed bin form or relevant web content enabling the citizen to self serve.

Where a chatbot is not able to help or manual assistance is requested, the customer can be routed at breakout points to a customer service adviser for assistance.

Other platform modules

Amazon Alexa Skill

Like Chat Bot Firmstep has applied the same concept to Amazon Alexa Skills. Continuing with the missed Bin example above, citizens who have an Alexa device or the Alexa App can now say "Alexa, my bin has been missed" or a variety of other phrases which may include the bin type, colour, or other local terminology. As above Alexa will cross check against council data to confirm the correct day and any recorded incidents of contamination etc. Where a recorded incident is found, or it's the incorrect day, Alexa will advise the citizen accordingly. Where the missed bin is, genuine and can be reported, Alexa will confirm if the citizen would like to proceed and report the bin: "Our records show your refuse bin was due for collection yesterday. Would you like to report it as missed?" Once the citizen responds back "yes", Alexa will initiate a request which automatically creates the missed bin within the Firmstep Platform. As Alexa is linked to the citizen's self-service account, personal information such as name and address would not need to be collected manually as these are automatically pulled from the Alexa profile.

Our Alexa integration empowers Councils to provide a broad range of Alexa skills which can be delivered with assistance through individual projects or delivered directly by Councils using our Alexa Skill building tool.

Kiosk

Kiosk helps to automate face to face contact by offering a range of self-service features within mediated contact environments such as receptions, one stop shops and libraries. Kiosk is provided through tablet devices mounted in these locations which allow customers to:

- Self-Serve using our Self portal and other online resources which you wish to promote
- Scan and drop documents for services such as Council Tax, Benefits and Housing. Scanned documents can be automatically pushed and indexed into back office systems or assigned to back office teams for review
- Queue for manual assistance using the queuing capability of our Service module. Customers can select from a range of queues e.g. council Tax, housing etc while our optional Queue Wallboards display queue status and ticket announcements.
- Check-in for pre-booked appointments using our booking feature which can be made online by customers in Self or via mediated channels using Service

Queuing Wall Boards

Queuing is an optional extension to the queue capability of Service. This provides authorities with a virtual receptionist allowing citizens to queue themselves for services on arrival at a reception point or one stop shop. Citizens simply need to enter their details and select the relevant service using a tablet device. Alternatively, if they need assistance, customer service staff can also add them into a queue using the Service reception workspace.

The solution includes screens which can be displayed on wallboards showing the queue status as well as to announce the next citizen called. Tickets can be announced using ticket numbers or customer names which are displayed on the wallboard.

Shared Digital Workspace

The Shared Digital Workspace solution enables authorities to securely extend the Platform out to third-party organisations such as partners, contractors, and other public bodies (NHS, police and fire service etc). The solution provides these partners with a secure dedicated portal where they can login and access assigned tasks from the authority using the Platforms workflow.

Other platform modules

As well as accessing assigned requests for action, the Shared Digital Workspace also allows partner organisations to raise new requests. These requests can be purpose built for the partner organisation and such would not be available to customers or staff to initiate via our other portals.

The Shared Digital Workspace is fully mobile responsive allowing these third party organisations to access the portal on both smartphones and tablets in the field as well as on traditional office based desktop devices.

Business Portal

The Business Portal enables authorities to digitise their business centric processes through a dedicated self-service portal. The portal allows businesses to fully transact online, channel shifting them away from more expensive mediated channels which results in financial savings for the authority as well as customer service improvements.

Businesses can create an account on the portal through which they can track requests logged as well as respond to assigned actions and tasks such as providing more information, uploading supporting documentation, booking an appointment or making a payment. The Platform's MyAccount feature fully integrates with the Business Portal allowing businesses to view accounts held with the authority, such as Business Rates and Rent, in addition to presenting that information to staff in Service should contact be made via a mediated channel. Through a MyAccount, businesses can transact online to view e-bills as well as make payments and apply for related services such as discounts or exemptions.

Councillor Portal

The Councillor Portal enables authorities to digitise their processes for councillors through a dedicated self-service portal. The portal allows Councillors to transact online for a broad range of member and constituent services, channel shifting them away from more expensive mediated channels or dedicated member services teams resulting in financial savings for the authority as well as overall customer service improvements.

The portal fully integrates with the core Firmstep Platform, allowing records to be viewed in Service if the councillor makes contact via a mediated channel in addition to being fully embedded within the Platform's existing workflow. Workflow allows requests to be handled end to end within the Platform with requests assigned to staff across the organisation using Dash or even partner organisations using the Shared Digital Workspace. The portal is fully mobile responsive and available to councillors on any device.

Firmstep CMS

For authorities wishing to adopt Open Source CMS technology, Firmstep's CMS works in tandem with Self and the wider Firmstep platform.

Firmstep has invested significantly in building a distribution of Drupal so that any new customer can have access to this distribution at no cost other than hosting, providing a substantial savings over traditional CMS solutions. Drupal is one of the world's most adopted open source CMS technologies and has a large volume of government sites in the UK and across the world.

The Drupal distribution provides a pre-approved and tested collection of Drupal modules that all work together; the distribution will continue to grow as and when authorities want to add new services.

Firmstep have replaced many traditional CMS solutions with its Drupal CMS offering, providing citizens with a fresh and enhanced online experience while also providing the authority with substantial licence savings over the previous incumbent CMS solution.



Customer Network

The 'Customer Network' is accessible to all authorities. This innovation is a key tool in facilitating the sharing of best practice, successes and benefits realisation across our client base, it is also the hub of our customer success program which is a standard part of the Firmstep service.

Firmstep has also embarked on a large project of data analysis, using the vast volumes of data we have collected on each council's services and form submissions running through our Platform daily. This was initially a piece of work designed to help drive the Customer Network, however we are also using this metadata to help drive innovation and new ideas. For example, Account Managers at Firmstep have been using this (customer anonymised) data about individual authorities in the account meetings (service request volumes, channel shift etc.) to help inform the discussion and highlight areas of relative success and failure compared to other similar councils.

Through the Customer Network, authorities can also share the benefits they have realised by using the Firmstep Platform and identify which services they can transform digitally to generate income and make savings by viewing what other authorities have achieved. The site allows Firmstep customers to view form submission rates for the services that authorities provide, and subsequently identify which services authorities of similar types and size are offering digitally through the Firmstep Platform. The value that this site brings to our customers is that authorities can engage with one another as well as with Firmstep to identify how they can continue to develop and improve their digital services.

The Customer Network holds numerous examples of authorities that have achieved huge savings and improvements, please get in touch for more information.

Understanding the importance of evidence-based decision making and the need for robust data, the Customer Network also provides customers with data reports collated from their transactions through the Platform. This data helps identify channel shift success, is a great benchmarking tool, and highlights development potential by evidencing the full range of services that are being successfully delivered through the Platform.

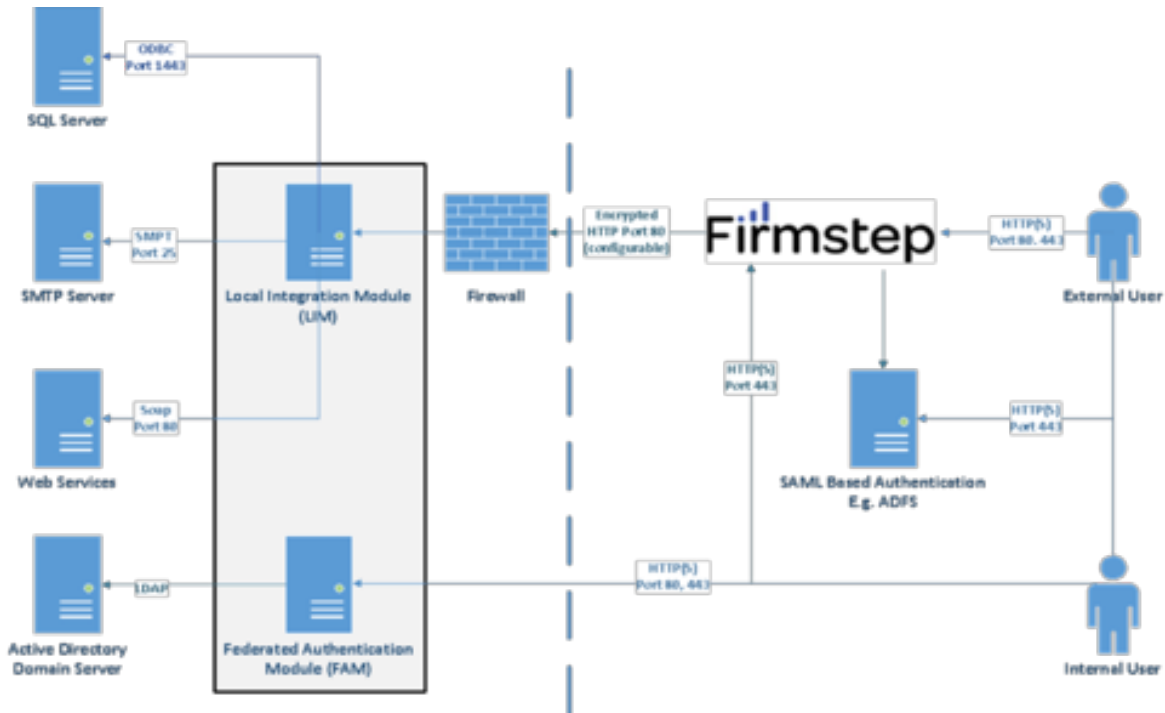
Technical Information

The Platform is hosted with our partner and leading global cloud provider Amazon (AWS) in their EEA EC2 environments.

Firmstep provides two small web applications, installed on the customer's infrastructure, to provide pass through authentication support with the Platform.

These are the Federated Authentication Module (FAM), which allows us to authenticate staff users against the organisation's Active Directory (AD). and the Local Integration Module (LIM), for back office integration with local systems. The LIM connects the Platform with the customer index to any back-office system and data source. The connector then translates this data back to the Platform.

We do support NTFS / Azure federated access services if clients prefer to use these rather than our FAM. The diagram below shows how these applications are typically deployed. We can support various configurations including double Firewalls and Reverse Proxy Servers.



Our user base drives the Platform roadmap. The Platform offers them the opportunity to take feedback from their users as well as from business intelligence data. We take new product and feature requests from across the user base, resulting in weekly updates for all. This ensures the Platform evolves at the cutting edge staying current and always meeting the changing demands of our clients and their customers. It also ensures our citizens are not restricted by old technology that continuously needs expensive and disruptive major upgrades. Firmstep are ISO27001:2013 accredited. We maintain a complete set of robust protocols and principles to ensure the solutions' security and availability.

GDPR

Compliance with the GDPR is a fundamental requirement of the Platform. To help our clients meet the requirements of GDPR here are some key features included:

Privacy by design

Firmstep implements measures to ensure the privacy of personal data is protected:

Secure Development Process

As part of Firmstep's ISO27001:2013 certified processes, we follow a secure development process. Additional information on Firmstep Security can be found in the Firmstep Principles of Security document. This document is attached at the bottom of the page. Firmstep follow the best practices set out in the AWS Security by Design whitepaper, including the automation of processes.

External IT Health Check

An external IT Health Check is conducted on a quarterly basis by a CHECK accredited organisation.

ISO27001:2013 Certified Processes

Firmstep operate a full ISO27001:2013 certified ISMS. All Firmstep employees receive regular training on the ISO ISMS and data protection requirements.

Platform Features

The Firmstep Platform supports some features to assist with protecting personal data including role based permissions management. The Platform also contains other security features including two factor authentication (2fA).

Consent Management

Clients can configure and capture multiple types of consent across all contact channels.

Data Retention

Retention periods can be configured and set for a variety of data types which includes case data, citizen accounts, emails, tweets, and web chat logs.

Anonymisation

Anonymisation periods can be configured for case data ensuring information is only kept if it's needed. This is configured at a granular level allowing individual fields types containing personal information to be selected while non-personal information fields can be retained. Combined with data retention above, this allows clients to configure both anonymization and deletion dates e.g. anonymise personal information after 6 months and delete the case after 2 years.

Right to Correct

Clients can update and correct historical case information where required in addition to other customer data.

Right to Forget

Clients can implement right to be forgotten requests. Configuration options allow for the exclusion of individual case types which should be exempt from the process.

Data Processing Audit Logs

All processing activity within the Platform is audited and available for interrogation.