

Self-service booking for funeral directors in Liverpool

Liverpool City Council has developed a 'digital first' self-service tool for funeral directors to book funerals at the city's cemeteries and crematoria. As well as reducing calls to the council contact centre for this service by 65 per cent and delivering annual savings of £64,500, the new tool enables funeral directors to respond to people's needs more quickly during this major life event.

The issue and context

Liverpool City Council has a Digital First strategy that aims to redefine the way the organisation functions and engages with its customers and staff.

The strategy's core principles are based on the standards defined by the Government Digital Service and the Local Government Digital Standard. Under this strategy a number of key workstreams have been identified looking at:

- customer access channels
- channel shift
- supporting digital infrastructure
- the delivery of key services
- workforce development.

One of the services identified for review in 2016 was the cemetery and cremations booking system. The review would consider the existing booking processes used by funeral directors and the options for enabling self-service for this customer group, including, where needed, integration with other solutions.

Home to two of the largest municipal cemeteries in Europe, Liverpool's six cemeteries and two crematoria take care of approximately 1,800 burials, 4,800 cremations, 800 strewings (scattering of ashes) and 1,200 memorial applications each year for its citizens.

The existing, telephone-based, booking system was available 24/7 but was soon to be reduced to core call centre operating hours. As death is not a nine-to-five event, one key objective was enable funeral directors to make booking 24 hours a day, seven days a week. This would

"We didn't want to replace the old system like-for-like. In line with the city council's transformation strategy, we wanted to reduce costs for the contact centre and at the same time create a better service for funeral directors."

Ian Geer, Project Team Manager

address the issue that, when somebody died on a Friday afternoon or over a weekend, there were two days where plans and progress regarding the funeral could not be made – a highly distressing delay for family and friends.

The council applied to the LGA Digital Channel Shift Programme for funding to help digitise this process and provide a self-serve facility for funeral directors to book ceremonies on behalf of the bereaved at any time of day or night, seven days a week.

Digital Channel Shift Programme

The work at Liverpool City Council to support its innovative use of digital technology has been funded through the Digital Channel Shift Programme, which is managed and overseen by the Local Government Association (LGA).

The Digital Channel Shift Programme was set up to help councils and their partners to promote greater use of online tools and technologies for the benefit of both their customers and staff.

The aim is for the digital tools and solutions created through the programme to be reused by other councils and contribute to the wider work to transform local public services.

The project objectives and targets

The project aimed to redevelop the cemetery and cremations booking service then used by the council's cemetery and cremations service, its contact centre staff and the city's funeral directors.

Liverpool's existing system was no longer fit for purpose. The software on which it had been built was now obsolete and no longer supported by Microsoft and it could not deliver self-service – bookings could only be made via the contact centre.

This lack of ongoing support created significant risk of service failure from losing the ability to book the city's crematoria and cemeteries.

During 2015/16, the council received 13,791 calls from funeral directors relating to cemetery and cremation bookings. By providing and promoting an online self-service booking system for funeral directors, the project team aimed to reduce calls by 50 per cent and deliver a total of £52,029 of savings from the reduction in use – and eventual removal – of the call centre facility in line with a corporate ambition to reduce call demand for council services.

Additionally, the new system would provide funeral directors with booking confirmations that they can review. This would reduce the number of complaints and issues that stemmed from misunderstandings over the phone.

The project formed part of a wider modernisation programme of the cemetery and cremations service and fell under Liverpool's wider Digital First strategy. The project team

“On average the contact centre would receive about 2,000 calls a month relating to burials and cremations. We wanted to reduce that amount and allow funeral directors to self-serve.”

Ian Geer, Project Team Manager

reported to a programme board comprising the ICT programme manager, senior cemeteries and crematoria managers, the council's heads of digital services and customer access, and a transformation and performance manager.

The LGA funding of £15,000 would be used towards the estimated cost of in-house product development of £20,283.

Targets

The project set out to:

- reduce the volume of calls from funeral directors by 50 per cent within six months
- remove the existing telephone booking service entirely within 12 months
- deliver £52,029 in savings from reduced calls.

“We had two problems: our current software wasn't supported by Microsoft any more, so we had a risk that if the software failed we could lose our ability to book. And we wanted to lessen our involvement with the contact centre as there was a drive from Liverpool City Council to scale back the non-emergency service from 24/7 to 9 to 5 through the working week.”

Alan Sheldon, Senior Cemeteries and Crematoria Officer

The approach and progress to date

When Liverpool initially applied to the LGA for funding to help digitise the cemetery and crematoria booking process it was considering procurement of an off-the-shelf product linked to an existing back-office upgrade.

However, this option was quickly found lacking as it did not fully meet the user need, so the project proceeded as a stand-alone in-house development.

The internal project team was assigned resource from digital services for the development, comprising project manager Ian Geer, a user experience manager, lead developer and content manager. In total, five departments were engaged to collaborate on this project: the contact centre, the cemeteries team, digital services, information and communications technology (ICT) and learning and development (L&D).

Overall, the team aimed to provide a new, single solution that could be used by both back-office staff within the cemetery and cremations service and contact centre staff, and also allow funeral directors to self-serve.

The cemetery and cremations service would then be able to manage the available slots of varying types across all of the locations it managed. The plan was that contact centre staff would initially continue to manage requests received via the telephone, using the same system to book slots. Funeral directors would also be given access to a new, more

“We have a good relationship with our IT department. They understand the complexities and the importance of getting it right. So, if we do find something that isn’t quite working correctly we can go to them and say ‘can you have a look at this’ and if they can they will put it right – if it is going to need a lot of development then we’ll try and work our way around it together and come up with a compromise.”

Chris Herdman, Registrar of Cemeteries and Crematoria

“As we developed the scope of the new system we felt it would be an optimum time to involve the funeral directors and allow them to make their own bookings. So we were taking a system that was very simple and used only by council staff and developing that into something that could be used externally and free up time for everyone.”

Alan Sheldon, Senior Cemeteries and Crematoria Officer

convenient, self-serve option enabling them to view available appointments, make a new booking and amend or cancel an existing booking.

The project was managed using an agile methodology, with weekly meetings between the project team and the service. Existing and ‘to be’ processes were mapped out with support from Liverpool’s transformation team and L&D during engagement with the cemetery and cremations service and the customer contact centre team.

The web-based system was developed using .NET, JavaScript and the Umbraco CMS linking to an SQL database.

User research

Engaging with internal users in the service itself and the customer services team went well. However the project team encountered difficulties engaging with funeral directors as a group during the user research and testing phases.

Individual discussions suggested that funeral directors’ core user needs were very similar, and that any differences reflected the culture and internal organisation of their own businesses. For example, some still wanted to have links with the contact centre through which to do their bookings, while others were really pleased that the contact centre would be removed from the process and replaced with a self-service option.

“It’s very difficult for funeral directors to set a time for working with us because their work can be so unpredictable and very demanding. So it was easy for me, having once worked in the industry, to be able to dedicate some time to testing the new system.”

John Little, Memorial Management Officer

Given the unpredictable nature of their business, it was difficult to arrange workshops for funeral directors to participate in formal user research. When focus groups were organised attendance was reportedly ‘hit and miss’.

Nevertheless, the funeral directors welcomed the change and were interested in testing the final system towards the end of the project.

User testing

User Acceptance Testing (UAT) was seen as an essential part of the process by the project team and would continue until the product was proven to be working well.

A decision was taken early on that launching an alpha version of the new solution and taking an iterative approach to fixing issues on a live product was too high-risk due to the potential repercussions of mistakes being made with funeral bookings. Double-booking funerals was not an option.

In addition, the team had previous experience of UAT and knew that users can often request new features to be added at this stage, which can cause delay. An extended UAT period was therefore planned.

Testing was approached in a phased process, with initial testing undertaken by the digital

“We intentionally didn’t include the funeral directors in the testing process until we were confident we had a system that was working well. There are members of our internal team who have worked in the business that were able to test it as funeral directors for us. Once we were confident it was working we used funeral directors as pilots.”

Ian Geer, Project Team Manager

services own support team. The prototype was then tested by the cemeteries and contact centre teams.

Despite the difficulty in gaining input to the testing process from funeral directors themselves, the project benefited greatly from having a member on the cemeteries team who is an ex-funeral director – with a deep understanding of the funeral director business.

An example of the type of issue uncovered in initial testing was that one of the crematorium locations unusually has two chapels for cremations. This had been documented but not dealt with properly in the prototype and required restructuring of the database in order for the system to accommodate this.

Another key issue to come out of early UAT was around print designs. The cemeteries and cremations team have some very specific print requirements relating to the exact style of report required by grave diggers. This had to be accommodated into the solution as it was seen by all as a ‘show stopper’.

First round failures such as the above were fixed before a second round of testing.

Due to internal resource availability in both the developer and contact centre teams, there were delays between the cycles of user testing and subsequent fixing of the issues that emerged.

In order to speed up the process, subject matter experts and digital services were encouraged to work more collaboratively within the rounds of testing. For example, a matrix was devised to give the developer better feedback on some conditional fields that failed on one of the forms, and a colour-coded (red, amber, green) tracker system was put in place so that all project team members and stakeholders could see current issues, progress and resolutions at any point in time.

“We gained from having one of our team who was an ex-funeral director who understood the funeral directors’ business very well. He guided us along the way and was very much our sounding board when we were developing the package.”

Alan Sheldon, Senior Cemeteries and Crematoria Officer

Training

Due to the difficulties in getting funeral directors to come to the council offices, it was felt that the best approach to training this user group was for senior cemeteries and crematoria officer, Alan Sheldon, to visit each business to train their staff in how to use the system.

Feedback from these sessions was positive, with these users finding the system to be very straightforward and easy to use – “We don’t need to be trained, we’re happy and if we have an issue we’ll give you a call”. Very few follow-up calls were received by the project team after these training sessions.

The system was also demonstrated at meetings for the National Association of Funeral Directors (NAFD).

Meanwhile, 59 of Liverpool’s contact centre staff needed to be trained in how to use the new system so that they could support those funeral directors still wanting to book by phone rather than to self-serve.

The in-house learning and development team produced guidance and conducted the training. A half-day programme took staff through the system and demonstrated how it operated – how each form worked and the different permutations of calls and requirements to complete a booking for a funeral director. Despite some delays – initially until after the final round of UAT was completed and subsequently until the training materials were signed off – this mixed approach to training, taking account of user need, was very successful.

LGA support

The project team found the support, best practice and information shared by the LGA during this project relating to user testing and user research invaluable. The LGA’s guidance was incorporated, where appropriate, into these processes.

Launch

The system went live to internal Liverpool City Council users early in October 2018 and to funeral directors later that same month.

Project milestone	Planned	Actual	Comments
Requirement gathering	Mar 17	May 17	Switch to in-house development
Design	Jun 17	Jun 17	
Phase 1 development	Sep 17	Sep 17	
Phase 1 user acceptance testing	Sep 17	Sep 17	
Phase 2 development	Oct 17	Nov 17	Delay in content availability
Phase 2 user acceptance testing	Dec 17	Jan 18	UAT is extended due to new requirements being introduced
Phase 3 development and user acceptance testing	Unplanned	Apr 18	Unexpected round of UAT completed which delayed go-live
Training	Feb 18	Jun 18	Dependency on internal L&D availability
LCC go-live	Feb 18	Oct 18	Internal and contact centre go-live
Funeral Directors go-live	Feb 18	Oct 18	First round of large funeral directors go-live



https://bca.liverpool.gov.uk/Booking-Calendar?LocationId=2&LocationTypeId=1

Liverpool City Council

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Alan.Sheldon... Administrator

Booking Calendar

Anfield - Cemetery

< > Today APRIL 2019 Month Week Day

MON	TUE	WED	THU	FRI	SAT	SUN
1	2	3	4	5	6	7
		8:30 Admin	8:30 Admin	8:30 Admin	8:30 Admin	8:30 Admin
		9:00 All Users	9:00 All Users	9:00 All Users	9:00 Admin	9:00 Admin
		9:30 All Users	9:30 All Users	9:30 All Users	9:30 Admin	9:30 Admin
		10:00 All Users	10:00 All Users	10:00 All Users	10:00 Admin	10:00 Admin
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Type here to search 09:45 03/04/2019

https://bca.liverpool.gov.uk/Booking-Booking-Settings

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Bookings

Funerals Director: All Location: All Location Type: All

Search: [] Date Range: []

Print Bookings

ID	First Name	Last Name	Location	Type	Date	Time	Is Cancelled
5026	THOMAS	OSBOLD	Springwood Rosemary chapel	Crematorium	25/03/19	14:30	No
5025	Isabel	None	Springwood Myrtle chapel	Crematorium	26/03/19	11:45	No
5024	Margaret Joyce	Sticks	Springwood Myrtle chapel	Crematorium	21/03/19	09:45	No
5023	24 Holt	not null	Springwood Rosemary chapel	Crematorium	21/03/19	09:00	No
5022	Agnes Josephine	Connolly	Anfield	Crematorium	21/03/19	11:20	No
5021	Irene	Subick	Springwood Rosemary chapel	Crematorium	28/02/19	10:00	No
5019	Richard	Carroll	Springwood Rosemary chapel	Crematorium	26/03/19	10:00	No
5018	Shirley May	Cox	Springwood Myrtle chapel	Crematorium	21/03/19	15:15	No
5017	John John	McCarty	Anfield	Crematorium	27/03/19	14:30	No
5016	Maureen	Roberts	Kirkdale	Cemetery	26/03/19	14:30	No

11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

The outcome – successes and challenges

Take-up and savings have been greater than expected in the six months since go-live in October 2018:

- Liverpool’s main funeral directors are all now using the system
- calls have been reduced 65 per cent from 2,000 a month to approximately 700 a month
- expected annual savings of £64,537.

As of the end of March 2019, seven of the key funeral directors are using the system, accounting for almost 70 per cent of business, with plans to bring the smaller organisations online within the next few months.

The expectation is that within the 12 months from go-live, calls will reduce further to approximately 100-150 calls per month. The contact centre team will have minimal input at this point, using the system as a reference rather than to take bookings. The contact centre team are also freed up to do other work creating further benefits for the council.

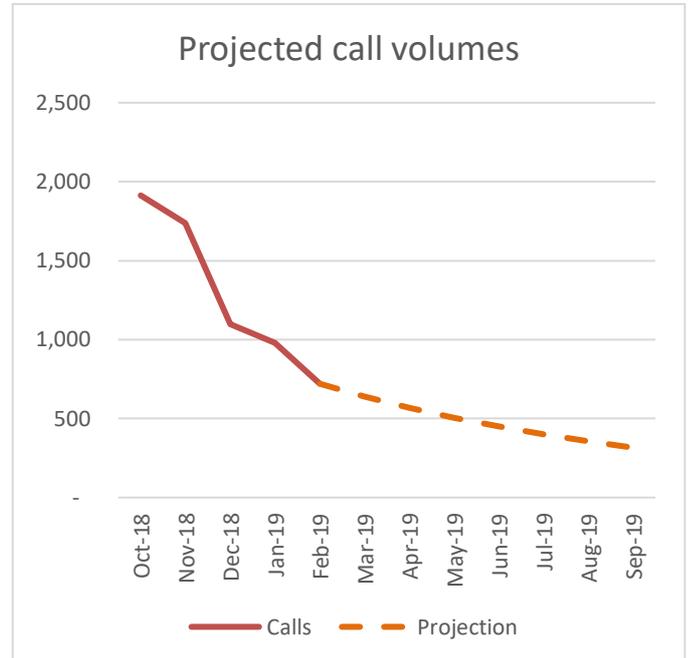
Under the new system the funeral directors have control over their own bookings and an opportunity to review the information that they have entered when they receive email confirmation of the booking. They can book at any time of day or night, seven days a week, via computer, tablet or mobile phone – helping them to give the bereaved the service they need, when they need it.

Financial benefits

Under the old ‘over the phone’ booking process mistakes could be made – someone could mishear, mistype, misunderstand. The new automated and self-reviewable system has eliminated mistakes due to human error.

“With the new system, you’re able to log on, see the plan for the following week and you can put that piece of the jigsaw in place for the family who can then go on to make their arrangements.”

John Little, Memorial Management Officer



This has already led to a reduction in the number of queries and complaints received relating to bookings. The projected annual

Area	Annual saving
Phone bookings	£59,209.30
Slot management	£ 3,296.02
Complaint management	£ 2,032.49
Total annual saving	£64,537.81

saving from the reduced time spent handling such issues is calculated at £2,032.

Meanwhile, the average call cost to the contact centre has been calculated at £4.50 per call – and as of February 2019 savings of close to £15,000 have been achieved from the drop in monthly calls. From this base, projected savings for the first 12 months of operation have been calculated at £59,209.

Additional savings of £3,296 are expected from the reduction in admin associated with managing booking slots, thanks to the now automated process.

“Funeral directors are now able to log in themselves, make a booking and will receive an email confirmation. That wasn’t possible on the old system – you had to ring up the contact centre, give all the details verbally and someone would input that information into the system.”

Chris Herdman, Registrar of Cemeteries and Crematoria

Whilst this is not a huge amount in the overall council budget, when viewed as part of a continuous improvement programme and transformation strategy, it is significant progress.

Non-financial benefits

Funeral directors have easy access to the system whenever they need it. They can view available slots at locations across the city in real time and quickly advise families of their options for holding the funeral at a very difficult time in their lives.

The potential for mistakes in booking information is significantly reduced as funeral directors can both input the information themselves and review the data captured after booking. They can also respond to changing family needs or requirements as funeral arrangements progress by accessing and amending the booking as required.

Overall, the cemetery and cremations service is confident that they are providing a better service to the funeral directors, and that the new system gives greater control to those funeral directors, enabling them to provide an even better service to their customers.

On the rare occasion where a booking mistake has been made the service will pull out all the stops to rectify it and ensure that funerals run smoothly.

Challenges

Engaging with funeral directors: the project team found engaging with the funeral directors a significant challenge. Many options were tried, from offering focus groups, demos, user testing and training workshops. Whilst not averse to the development, this business

customer group has a workload and schedule that is difficult to predict or align with standard office hours. However, direct one-to-one engagement and onsite visits to conduct training went down well.

User testing: due to the difficulties in engaging the funeral directors, user acceptance testing was challenging. Gaining time with internal users – the service and contact centre teams – was also difficult as they had busy, existing workloads.

User research: this was challenging in both directions – getting the users’ time to research their needs and also in the building the development team’s understanding of a unique, life-event-driven service. For example, not allowing burial bookings to generally be made at short notice – as time must be factored in for digging the grave – whilst at the same time accommodating the need for burials to be rapidly conducted in line with religious requirements.

Training: the council’s training policy meant that deployment into the contact centre took longer than expected. The project team underestimated the level of training required for contact centre staff, and also the difficulties of aligning workloads and fitting in with the learning and development team’s highly structured approach to the training.

Unusually sensitive service: due to the emotional impact on those using the service – the death of a loved one – the team was very aware that there was no room for error. Launching a service that made the process of burying a loved one harder would be unacceptable to all involved in the project. This presented an additional layer of challenge to the team and led to delays in delivery when issues around user research and testing were encountered.

“Most projects I do, when we do user acceptance testing and there’s some minor errors, the decision might be made to go live and accept that it’s not perfect and that it will get better over time. With this project you just couldn’t do that – you just can’t have a double-booked funeral.”

Ian Geer, Project Team Manager

Key learning points

Focus on the service: never assume that all services within a council run in the same way and be ready for two-way learning about niche and specialist services, and their unique user needs.

Engage stakeholders: earlier engagement to build relationships with internal stakeholders would have benefited the project. Regular meetings with all stakeholders are essential in order to maintain these relationships, manage progress and ensure communication.

User research: exploring user need with key system user groups is essential, but it can be hard to realise. The challenge of getting funeral directors to engage with the process caused problems for the team – however, harnessing the knowledge of a team member with previous experience in that sector provided a knowledge base from which to explore user need.

Encourage in-house development: the agility and flexibility of in-house development and the strength of the working relationship between digital services and the service benefited the project. For example, if user needs changed during testing a simple discussion led to a resolution, rather than a re-scoping of the specification with an external supplier.

Demo the prototype: with this particular end user audience, the funeral directors, it was hard to engage them until they could ‘see the thing’.

Testing: the testing process took longer than expected with delays down to the unavailability of key staff both for testing the product and its subsequent development to address any issues. In addition, gaining input from key

“Funeral directors are just so busy dealing with funerals it was unrealistic to get them all in one place at one time to do training. So, it has been a very much one-to-one approach. Alan Sheldon had a close working relationship with the funeral directors so it was decided that it was best for him to do the training himself.”

Ian Geer, Project Team Manager

“It’s essential to really understand the service. It’s such a niche service and I had no knowledge before about burials and cremations and now find myself knowing much more than I thought I ever would. So, it was a bit of a learning curve not just for me but for our in-house developers too.”

Ian Geer, Project Team Manager

users, funeral directors, proved problematic, again leading to delays in completing the testing process.

Manage expectations: some of the feedback from testing related to the new product ‘not looking like the old system’ rather than its functionality. Expectations about the reasons for change could have been better managed in advance to ensure that testing focused on the system itself.

Training: consider the different users – both the external customers and internal users and build the training activities into the project plan. The call centre training needed to be aligned with other departments’ priorities, policies and availability. The unique sensitivity of the service also affected the call centre’s confidence in the change, which needed to be addressed in training. Meanwhile, onsite one-to-one training of funeral directors proved particularly successful in driving take-up in this case.

Balancing sensitivities: with such a sensitive service, Liverpool had to balance the pressure to deliver with the needs of the ultimate end user – bereaved families. Despite following an agile approach to delivery, the team felt it was not appropriate to deliver a product ‘90 per cent ready’ and iterate thereafter in a live environment, due to the unacceptable risk of errors in funeral bookings.

Tracking: the colour-coded change and amendment tracker worked extremely well in coordinating and updating a team made up of people working in different services and on different projects about progress status and focusing attention on issues that were holding back the project.

Next steps

The system is working well and is liked by all users.

All of the large funeral director businesses are now live on the system and the team is in the process of bringing on board the smaller funeral director businesses with the aim of reducing bookings over the phone to zero.

After this process is complete the team is keen to explore potential 'add-ons' to the system, for example, selling memorial products.

Meanwhile, there has been significant interest from other councils about potential use of the product. It is one of the first in the sector to deal with both burials and cremations on the same booking system and has received good feedback on its functionality.

The team plans to explore how they will be best able to share the assets developed and the learning, and support the reuse by other councils. One option for consideration is to make the code open source and freely available to councils. However, an ongoing maintenance and support model is yet to be devised.

“As far as we know no other council has a system similar to this – especially one that has been developed in-house. We’re quite proud of it, and there’s been a lot of interest from other councils who have either heard about it or have seen it during demos.”

Ian Geer, Project Team Manager

“This is a good news story for Liverpool. We’ve come up with a solution to a problem that was initially imposed on us but we’ve developed something that’s future-proof, agile – and we’ve also done it quite cheaply.”

Alan Sheldon, Senior Cemeteries and Crematoria Officer

“We are getting really good feedback from the funeral directors to the point that the last funeral director I went to see isn’t actually a major user of our service but is the president of the National Association of Funeral Directors for Merseyside. He was so pleased with the system that he has invited me to give a presentation at the next meeting!”

Alan Sheldon, Senior Cemeteries and Crematoria Officer

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