

# SERVICE DESIGN AND DELIVERY

**R**eflecting recent developments in the public service reform agenda, public service providers have requested additional guidance in the areas of:

- take-up of e-services
- efficiency savings
- design of high-quality public services

This Service Design and Delivery Guidance provides assistance to those facing the challenge of electronically enabling public services. The assistance is made up of principles, guidance, tools and checklists that can help them succeed. The main messages for building effective service delivery are listed below.

## SECTION 1: PRINCIPLES

'Public service provider' is used as shorthand for central government, local government, non-departmental public bodies and agencies.

### 1.1 The strategic intent

The efficient delivery of high-quality public services.

### 1.2 Principles

**Principle 1:** Maintain and implement a service design and delivery strategy which improves the quality of public services, creates significant take-up by electronic channels and results in cost savings.

The principle builds on the previous channels framework, but has been updated to reflect the recent policy drivers. The principle is predicated on the idea that a high-quality service will meet customer needs and be efficient to run.

The levels at which a service delivery strategy needs to be maintained will depend on the composition of services offered by, and organisational structure of, a public service provider. Those offering a disparate set of services, delivered by a multiplicity of business units, might initially require a strategy for each business unit – and a broader 'vision' strategy for the provider as a whole.

The 'vision' or highest level service delivery strategy should be owned at the uppermost level of the public service provider by a senior champion.

**Principle 2:** Design and deliver all services on an e-enabled multi-channel basis, using research about customer needs, access and usability requirements, and exploiting self-service wherever possible.



While customer needs should always be at the core of the service design process, so too must the needs of the provider. Service design will be a balancing act between the value created for the customer and that for the provider. Value to the customer will be reflected as a 'better' service, value to the provider by cost savings and/or the realisation of the policy goal underpinning the service.

The principle embraces several fundamental ideas of service design. Customer requirements must be at the heart of the design process – usability and accessibility through multiple devices should be central to the design of services. Customer needs may also cross boundaries between providers: existing silo-based delivery should be challenged with an emphasis on joining up services around the requirements of the user rather than the organisational structure of the provider. Partnership working across organisational boundaries will be encouraged.

New services should be designed for delivery in a multi-channel e-enabled environment from the outset.

Public service providers should look to exploit the potential of electronic channels to allow those customers who are able to benefit from a 'self-service' delivery model.

All services are cited because even physical services have an information or transaction element which can be e-enabled.

**Principle 3:** Utilise existing citizen or business e-enabled service providers before investing in or upgrading public e-services.

This principle is designed to ensure that existing cross-government initiatives are exploited fully before further investment is made.

*Specifically, public service providers are expected to:*

- investigate the use of private, voluntary or public sector intermediaries
- deliver services through Directgov, or if appropriate through Businesslink.gov
- build and design all citizen-facing services so that they can be easily incorporated into Directgov at a later date, if immediate delivery via Directgov is not possible
- specifically consult Businesslink.gov in designing services focused on small or medium-sized enterprises (SMEs)

**Principle 4:** Design and deliver services according to e-Government service standards.

*This will include:*

- government customer segmentation guidance
- government service design standards
- usability, search and navigation guidelines – business models for authentication and identity management
- cross-selling and cross-referencing guidelines – metadata standards, e-GIF
- government branding guidelines
- government service operations standards, eg routing between self-service channels and call centre case handling

Some of these standards exist already and will be incorporated into a more comprehensive service design and delivery standards framework at a later stage.

**Principle 5:** Set and manage a migration plan which progressively moves customers to cheaper channels and a lower cost per transaction, whilst maintaining or improving the quality of the service. Ensure there are specific milestones for switching off or winding down expensive channels.

The mechanics of migrating customers from one channel to another will vary from service to service and provider to provider. This principle means that cost per transaction will need to be measured, according to a structured measurement framework. In certain providers it may be difficult to measure activity-based costs; however, a way of benchmarking must be found in order to produce meaningful performance and cost data. The overall quality of the service should not suffer because of a drive to lower the cost per transaction.

**Principle 6:** Set targets for, measure and manage customer usage of and satisfaction with the service.

Customer satisfaction needs to be measured for performance improvement reasons. Customer usage patterns (which will encompass take-up) are needed to ensure that service refinements are evidence-based.

## SECTION 2: TAKE-UP AND CHANNEL MIGRATION

This explores some of the key issues around achieving increased take-up, and migrating customers from existing to new channels to create value for the customer and the provider. It will cover the incentives and inhibitors to migrating customers between multiple channels, and the techniques to encourage that migration.

### 2.1 Customer take-up of e-services

New channels produce greater choice for customers. Understanding the needs and preferences of customers is vital if these channels are to

be successfully exploited by public service providers. Demanding customers seek government services that are accessible and easy to use, and government is committed to meeting this expectation efficiently. Today's customers increasingly use traditional and electronic channels when accessing services.

*The choice of channels available to customer groups varies depending on three factors:*

- capability of the channel to support particular services
- the accessibility of a channel to its target customer segment
- the propensity of a target customer segment to use it

Customer preferences vary considerably by age, socio-demographic group, and location. Universal preferences cannot be assumed and therefore, to ensure accessibility and inclination to use a channel, providers should find out the preferences of their customers in relation to the services and the types of transactions required.

*Customers place importance on the convenience of accessing government services via a mix of channels, for example:*

- visiting one-stop-shops
- using an intermediary such as a post office
- by telephone
- browsing websites

Private sector experience of multi-channel access has shown that traditional channels still play a significant role in facilitating the uptake of new electronic channels. Many new channels are therefore seen not as replacement channels but complementary. The private sector experience also shows that customers use different channels to consume different services but are equally likely to migrate between channels depending on their circumstances at the time.

*This implies two key working assumptions:*

- transactional processes should be consistent across the different channels so they appear seamless to the user
- new channels when adopted by providers as an attempt to drive costs out and lower the cost per transaction, do not always result in the more traditional channels becoming redundant

However, this will vary from service to service. In some cases providers will want to end the use of a certain channel as quickly as possible. For example, utility companies have been working hard to discourage the use of payment by cheques. They do this by offering financial incentives that encourage payment by other channels and methods. Discounts are offered if the customer sets up a direct debit, pays by credit or debit card with a call to a contact centre or adopts the self-service approach by paying over the internet.

#### 2.1.1 How to encourage take-up

The following examples are some of the methods available to providers to increase take-up.

##### Marketing

Simply making services available through new channels does not necessarily mean that customers will use them. Behaviour can be influenced by making people aware of the value added to their service experience when using new channels and thus making take-up more likely. The key to influencing behaviour positively is to market the advantages of changing – or indeed the disadvantages of not changing – to the customer. Positive drivers need to be identified and used since inertia is often the most powerful shackle preventing behavioural change.

##### Incentives

Offering customers incentives to use an online service is a useful approach to drive take-up, and public sector providers should consider the full range of resources available to them.

*The National Audit Office report on incentives in e-government outlined four principal ways in which government could drive the use of new channels:*

- **Money:** Direct financial incentives or payment flexibility are powerful ways to encourage customers to use a new channel. Some services owners, particularly those delivering services to which the customers are price-sensitive, have succeeded in migrating

customers to new channels by offering a lower price to those who serve themselves. This approach has been very popular in the utility sector. These incentives need to be accompanied by a comparable service level between old and new channels, to ensure the change in behaviour is permanent.

- **Legitimate authority:** Compelling customers to use a channel is another option to consider. Some companies have benefited from e-commerce by offering customers no alternative but to use the internet if they want to access a new service. Behind the scenes, the organisation has benefited from this approach by combining self-service and a highly tuned delivery process that allows the low prices to be offered while maintaining good profit margins. There are, of course, some significant differences between the private sector and the public sector when considering the compulsion approach. Public service providers should be aware that the implications of channel closure, or even limiting access to certain channels, can vary considerably depending on the nature of the target customer segment. Political considerations will play a significant role in the decision making process. For many services the use of compulsion and/or offering price differentials to use specific channels may be difficult to justify where it will give rise to claims of inequality for those without access or ability to pay for those channels.
- **Time:** Saving a customer time can be used as a direct incentive. For example, personal tax returns need to be sent by post to the Inland Revenue by September to calculate individual tax liability. However, customers can gain a three-month extension on this deadline by filing their return electronically via the internet. This customer benefit has been actively marketed by the Inland Revenue, resulting in increased take-up of the online return service. Time can also be saved for the customer by allowing trusted intermediaries to bundle services with other related services or products, or by simply making them available to the likely customer segment via other existing relationships. This results in time being saved for the customer by allowing them to use sites and interfaces they already visit, and are consequently familiar with.
- **Information and expertise:** Customers can also be encouraged to use a new channel by providing them with enhanced information and expert advice through website content and intelligent applications.

**2.1.2 What discourages take-up**

As well as the factors that encourage customers to use a service, it is important to understand the elements that inhibit customer use. Figure 1 describes some of the key inhibitors for customers migrating to self-service channels, and some suggested measures to minimise their impact.

Inhibitor	Counter-measure
Lack of confidence in security (of personal information)	Get it right. Commission an independent security review to try and break it.
Lack of accessibility	Plan the right services for the right customer segment
Non availability of service	Model your volumes optimistically to ensure adequate scalability*
Poor usability	Pilot service with subset of target customer segment
Lack of (channel) skills	Plan the right services for the right customer segment
Lack of, or poor, support	Provide an effective and complementary support channel

Figure 1: Inhibitors of channel migration and counter-measures

**2.2 Channel migration**

When a provider decides to 'migrate' its customers across channels, it is embarking on a major business transformation, impacting all areas of its operation. The results will be very visible to both its stakeholders and its customers.

*In order to plan an effective channel migration programme, it is essential for the provider to:*

- understand where the provider is today
- where it wants to get to
- what the gap is
- what needs to be done to close that gap

**2.2.1 Baseline the information**

In order to plan the channel migration, baseline information will be needed to identify where the provider is, and where it wants to be. Much of this information will be available from the channel selection phase of implementing this multi-channel service delivery strategy. However, it may be necessary to improve the level of detail and quality of the information to improve the quality of the programme plan.

*The information required includes:*

- how are services currently delivered; by which channels and to which customer segments?
- how will services be delivered; by which channels and to which customer segments?
- customer preferences and behaviour (drivers)
- operational model and associated activity-based costs

**2.2.2 Plan the changes**

Once the baseline information has been established, the objectives of the programme can then be defined as incrementally closing the gap between the current state of affairs and the target service vision of high take-up, reduced costs, and better quality services.

*To plan the changes required to deliver these outcomes, it will be necessary to analyse other details, such as:*

- the current organisation, including staff numbers and breakdown of skills
- the current infrastructure, in terms of buildings and communication networks
- the scope of services and the circle of influence
- deconstruction of processes that underpin and support the provider's core services
- the information systems that support those processes, specifically those that support the customer channels involved

**2.2.3 Who needs to be involved?**

The overall migration may affect the majority of staff, and the strategy is likely to fail without their understanding and commitment. As with all such change programmes, early and effective communication is required to achieve staff buy-in to the reasons for the change and its objectives.

*In terms of who should be involved, the following structure is suggested:*

- governance needs to be at the executive board level of the provider
- an empowered team should be established to drive the change process through the provider
- establishment of an agreed cooperative management team
- single high-powered sponsor
- high-level issue resolution committee
- empowered mid-level steering committee to manage day-to-day issues and resolve them

- use of external experts to assist in identification of best-of-breed or likely success scenarios

*Once the people structure is in place, they should operate to the following set of criteria:*

- clear set of goals and objectives agreed and adhered to by all participants
- identification of common internal drivers
- intolerance of unilateralism and personal or political agenda-pushing
- clear and strong project management

- information flows designed to illuminate, not obscure
- timelines designed to deliver in managed phases, not 'big bang'
- clear business plan against which all deliverables are measured and monitored for success
- clear accountability

**2.3 Channel Migration and Value**

**2.3.1 What is value?**

Value is deemed to be provided where additional benefits are gained from consumption or provision of services and/or cost savings are generated without a corresponding drop in quality or level of service.

Service design will be a balancing act between the value created for the customer and also that for the provider. Value to the customer will be reflected as a 'better' service, value to the provider by cost savings and/or the realisation of the policy goal underpinning the service.



**2.3.2 Identifying value**

Providers need to identify and exploit the 'value' of migrating customers to new electronic channels. Invariably this value will be represented in terms of reduction in operating costs, increased customer satisfaction and the successful delivery of a policy objective.

The provider needs to plan how it will release cost, and a clear strategy is required. This strategy should address questions such as: "Are staff going to be redeployed or removed from the provider?"; "Which new skills will be required?"; "What infrastructure could be released?"; and "Which contracts will need to be wound up or renegotiated?". Providing the answers to these questions will help to ensure maximum value is achieved via the migration of customers to new channels.

**2.3.4 Business case**

The business case for deploying services through new channels should identify the value to the provider, including benefits for staff, along with the value to customers. Customers must use the channel in significant numbers if organisational benefits are to be achieved.

In the context of electronic channels, greater value creation is more likely to be achieved by the offer of information and transactional services that stem from a totally reengineered service delivery proposition. Simply automating an existing service process is unlikely to add value to either the customer or the provider. The clear demonstration of benefit to both the provider and customer is essential to the success of a service delivery strategy.

The business case for channel migration can be made by comparing the investment required by the programme to the savings in operational costs to be achieved. This is usually done through a combination of cost avoidance, cost reduction and revenue increase. However, other benefits such as service levels and customer satisfaction should also be taken into account for a better picture of value. A method of scoring these softer benefits is also needed. The public sector has experience of successfully using a balanced scorecard methodology, with its emphasis on achieving outcomes and continuous improvement, for benefits measurement – for example, the e-Government business case guidance available from the Office of Government Commerce's Successful Delivery website.

**SECTION 3: MULTI-CHANNEL MANAGEMENT**

This section analyses how to manage a multi-channel environment, and offers some insights into how service delivery in a multi-channel environment might be improved.

**3.1 Multi-channel management – what is it?**

Multi-channel management is about trying to achieve and maintain a single view of the customer for the provider - and a single view of the provider for the customer, in order to maximise the level of service. It is also about trying to create an organisation that uses its investment in people, process, technology and infrastructure efficiently.

*The key objectives in this area are:*

- maximising take-up of self-service channels
- realising cost savings
- improving the quality of services

Management of the multi-channel environment should aim for continuous improvement against these objectives. It also requires an appreciation of their interdependencies; for instance, the trade-offs that must be made with respect to cost and service delivery quality. These are determined, in turn, by the nature of the cause-and-effect relationship that exists between drivers and a set of variables, such as marketing to boost take-up or increasing capacity to improve customer service.

In order to realise long-term benefits, multi-channel management should be a responsibility of the whole organisation, and the efforts of the executive board should be specifically focused on dealing with the three key objectives.

**3.1.1 Delivering effective services to customers**

It is imperative to constantly monitor customer perceptions of the services they receive.

*Although they change over time, and change more rapidly for emerging channels, the public perception of value for money will ultimately be judged on the effectiveness of service delivery:*

- did they get what they wanted?
- was it delivered in good time?
- was it easy to use?
- was it convenient?
- was it safe?
- when it did go wrong was there a suitable fix/redress?

**Customer expectation:** Meeting a customer's expectation is important, as is managing those expectations. If customers are made aware of a new self-service channel, but their initial experience does not live up to expectations, they are likely to revert to their previous channel and may not return quickly.

**Performance is critical:** If the basic technical and business architecture to support the service is scalable, then much will revolve around capacity planning. Hardware and software costs may pale into insignificance when compared with the damage to a provider's image and the financial cost of resolving the problem, if not enough capacity is built into plans. Recall the negative commentary that followed the launch of a supermarket loyalty card that encouraged online registration but did not provide sufficient server capacity to cope with the spike in demand that followed its launch.

**Trends:** Usage should be monitored and recognition of forthcoming marketing campaigns taken into account as they may cause sudden spikes in demand. Targets for self-service take-up volumes should be viewed with caution for the purposes of capacity planning.

**Service planning:** Service planning is an end-to-end activity. Scalability, for instance, is not just about technical architecture, it is about being able to meet and react to changes in demand. There are few self-service channels without associated support services – these support services tend to be well-trained customer advisors. It is far easier to add new servers or upgrade software licences than to recruit and train effective customer advisors at short notice.

Moreover, there is little point in having a slick front end that allows a transaction to be commenced with the minimum of fuss, if there are subsequent delays caused by lack of fulfilment capacity needed to conclude the transaction. It is necessary to look at a complete picture of the service to the customer, and plan accordingly.

### 3.2 Realising cost savings

The governing objectives of channel management are to increase and maintain take up of low-cost electronic channels, drive costs out of organisations and increase public service quality. Public service providers will be investing to introduce new channels and market them. Return on the investment will be demonstrated by lower ongoing operational costs, a lower cost per transaction and the consequently more efficient 'journey' from policy through service delivery to outcome.

With this in mind, organisational capability and capacity should be designed for maximum flexibility and efficiency. The same service capability should be deployed regardless of which channel is used to access the service. Flexibility to deploy resources, typically people and infrastructure, to where they are needed by a continuously changing channel mix is also essential. As the capacity of new self-service electronic channels grows, the capacity of the channels they replaced should be lessened proportionately. Ultimately, costs can only be saved by removing resources from the cost base.

*There are two key types of such resources:*

- **People:** Plan and communicate restructuring initiatives in advance. Explore all the alternatives and gain the cooperation of stakeholders, remembering all the while that it is important to retain the right skills for the future shape of the operation.
- **Property and infrastructure:** Forward planning is essential as buildings and major equipment typically have long-term leases or service contracts associated with them, so releasing cost quickly can be difficult. The impact of other initiatives, such as flexible working, should also be taken into account when looking at the required property portfolio.

In some cases the benefits to be realised will be more complex than simple cost reduction. Many public service providers have revenue streams that make a significant contribution to their financial status. In these cases, whilst new channels offer the chance of attracting new customers and therefore revenue, it is vital to keep one eye on protecting existing revenue streams to realise long-term benefit.

### 3.4 Business transformation

As well as addressing the key drivers, a prerequisite for benefits realisation is the accompanying need for business transformation. Managing the change in service delivery will impact the provider strategically as well as operationally.

*Each provider should consider:*

- developing its people skills and job roles
- aligning and restructuring its business processes
- supporting it by selecting appropriate technologies

#### 3.4.1 People skills

The key to achieving all this is suitably skilled people. Public service providers must employ people who have the skills to drive a business process change programme and people who understand the role of strategic marketing. Any skills gap within a provider in these areas should be addressed before trying to embark on a significant service delivery programme.

*In order to identify the skills gap, the two key organisational areas involved in service delivery should be examined:*

- front office – manages the channels
- back office – manages the capabilities that underpin individual public services and supports the organisation as a whole

Back-office functions are aligned to processing individual public transactions in a channel-independent way, whilst the front office manages the relationship the provider has with its customers across all channels in a service-independent way. The two responsibilities require different skills and different service cultures, and they need to be measured differently.

*The success of the front office will be measured on:*

- understanding its customer base
- optimising the customer experience
- migrating the customers between channels

*Some of the specialist roles required in the front office will be:*

- customer service agents
- customer service managers
- customer analysts
- marketing professionals

The back office will be responsible for processes associated with services, such as decision making, document management and mailing of paperwork.

*Success here will largely be measured on:*

- service levels
- efficiency

The staff will be experts in their own service domain, and largely responsible for traditional fulfilment activities. Customers often need to speak to experts who are working on their case, so many back-office staff also need customer-facing skills.

#### 3.4.2 Business processes

The business processes that support individual public services, and those that support the provider as a whole, will need to be analysed, deconstructed and reengineered. In particular, processes need to be deconstructed into customer transactions, front-office steps, and back-office steps.

Breaking down a service into its constituent processes will enable opportunities for reuse of process steps across services in the future, with resulting cost savings.

Customers may choose to transact with the provider using different channels through the lifetime of a single service. Process steps therefore need to be largely channel-independent, in order to provide the

customers with a consistent view of the provider, however they choose to transact.

A provider should segment its customers, and map them to appropriate business processes and their propensity to use a given channel. Better views of customer touch-points within business processes will enable providers to improve processes and services across the board. The emphasis here is on continuous improvement.

**3.4.3 Technology**

Information Technology (IT) will underpin reengineered processes.

*The following should be taken into account by public service providers to support the delivery of services:*

**Multi-channel architecture:** A multi-channel service delivery architecture is the 'blueprint' by which IT strategists plan to support the business requirements of a provider. This does not have to be overly elaborate.

**Technology solutions:** The e-Government Unit will develop guidelines and principles to support public service providers in creating a technical architecture to support service delivery.

This will allow public sector organisations to develop multi-channel solutions to meet their own needs whilst at the same time delivering a coherent government-wide channel architecture. The main benefit will be the reuse of architectural design patterns, infrastructure and software.

One of the key areas in which guidelines are being developed is the use of commercial off-the-shelf (COTS) solutions.

*If purchasing COTS solutions, the products should support activities such as:*

- customer relationship management
- workflow
- case management
- electronic documents and records management

Systems built in this way are easier to interface with other systems. They are also easier to replace or upgrade as the service delivery requirements change.

The majority of COTS solutions supplied by the major vendors are now produced with multi-channel models in mind. Only where there is a compelling business case should bespoke development be undertaken. If this approach is followed, the provider should ensure that technology lock-in does not ensue.

**Customer recognition:** The front office should incorporate technology to manage day-to-day contacts as well as maintain long-term relationships with customers. The key is the ability to recognise whether a contact is an existing customer or someone who is not known to the provider. Failure to achieve this transparency will result in the continuation of individuals having multiple existences within a single provider. This can result in the provision of a poorer service to the customer and a waste of resources at the provider.

**Channel blending:** A solution is also required for real-time channel blending. This is when a customer transacts with the public service provider via multiple channels at the same time. For example, the customer is on the web and needs help so they telephone a 'Help' function within a call centre. To provide effective service and help them directly, it is essential for the customer service agent talking to the customer to know what the customer is doing on the web.

**CONCLUSION**

*Developing a strategy that embraces the elements outlined above will provide the flexibility for providers to:*

- deploy new services and make changes to existing ones
- add new channels as they get adopted by the population

Further details on the technology aspects can be obtained from the Technology Policy team in the e-Government Unit who are producing a solution guide to help providers implement effective technology solutions to support service delivery.

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