Connected support and care

The future of human and social services

KPMG International

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It's time for better human and social services technology

If you had to find a sector that is challenged by technology, it would be human and social services (HSS). Governments and providers have consistently responded to increasing demand by spending more on direct services. Consequently their tendency has been not to take a comprehensive approach to investing in technology. That approach was reasonable until about five years ago, but the speed of change now means that HSS organizations not investing in technology likely will be left behind.

In parallel, customer expectations are increasing dramatically. People expect to be able to go online, get the information they need and interact with services at any time. In many jurisdictions, HSS organizations compete in markets, so those that are not able to provide access to services, good information and responses in a timely fashion will miss opportunities.

HSS organizations that get left behind will be damaged and may not survive. But those that improve their use of technology should enjoy greater efficiencies, such as by standardizing processes, operating services online and assisting customers who can self-manage to use technology to access resources.

Organizations in other sectors are also struggling with becoming more customer-centric and it is for this reason that the KPMG Connected Enterprise framework was created. To support HSS organizations, this framework has been tailored to the needs of the sector to make clear the relationship between the benefits of technology and the purposes of HSS organizations. This includes a maturity matrix allowing organizations to benchmark themselves against industry standards, which we believe is unique. Frequently, the sector cobbles something together from a broad government approach or borrows from health, but this framework has been specifically customized for HSS. The KPMG Connected Enterprise for Human and Social Services framework is also focused on service delivery and the fundamental processes required in delivering services to customers.

This is a great time for HSS to invest in better technology. In particular, there is a huge opportunity from the advent of more modular technological solutions, as opposed to the historic model of big bespoke systems. There are now products available that recognize the unique requirements of the sector which can be bought off-the-shelf and adapted for individual organizations at a modest cost. As well as benefits in productivity and standardization of processes, HSS leaders and managers can use these tools to better understand the quality and nature of services being delivered to customers, which is increasingly something they have to deal with.

COVID-19 adds a further reason for HSS to improve its use of technology. Research commissioned by KPMG International has found that the global pandemic has caused HSS organizations to prioritize digital transformation strategies, with 71 percent of respondents accelerating elements of their existing strategies and 67 percent increasing their digital transformation budget.[1] Services have moved online, barriers between organizations have been broken and governments have pushed services into re-designs based on what customers need.

The pandemic has fundamentally altered many elements of society. For this sector these changes have been rapid but also often positive, as many people have come to appreciate the great value of the care workforce's contribution. Organizations have an opportunity to maintain this positive momentum, adopting better technology to build a new role for HSS in society and the economy.

Liz Forsyth
Global Head, Government, Healthcare and Infrastructure
Global Lead for Human and Social Services
KPMG

Consumer centricity trends in the human and social services sector

In late 2018 KPMG International commissioned Forrester Consulting to conduct an online survey of 345 decision-makers in the human and social services (HSS) industry to understand their goals, investments and challenges involved in establishing a customer-centric strategy.[2] This research also identified the top trends impacting HSS organizations and their priorities, drivers and challenges, and provides insights on the future of the sector and what organizations may want to focus on. The findings of the research and their implications for the HSS sector are explored below, with additional updates in light of the pandemic in the following section.

Data is often not connected to services

The HSS ecosystem that surrounds a customer is complex and produces a mass of data about their needs. However, only 37 percent of organizations regarded their data and analytics capabilities as enabling them to deliver effective customer services.

Seventy-five percent were effective at collecting/transferring data, and most had the analytic technology they need, but organizations could do more to align data strategies with outcomes and to manage governance.[3]

About the research

Online survey of 345 HSS decision-makers in six jurisdictions.

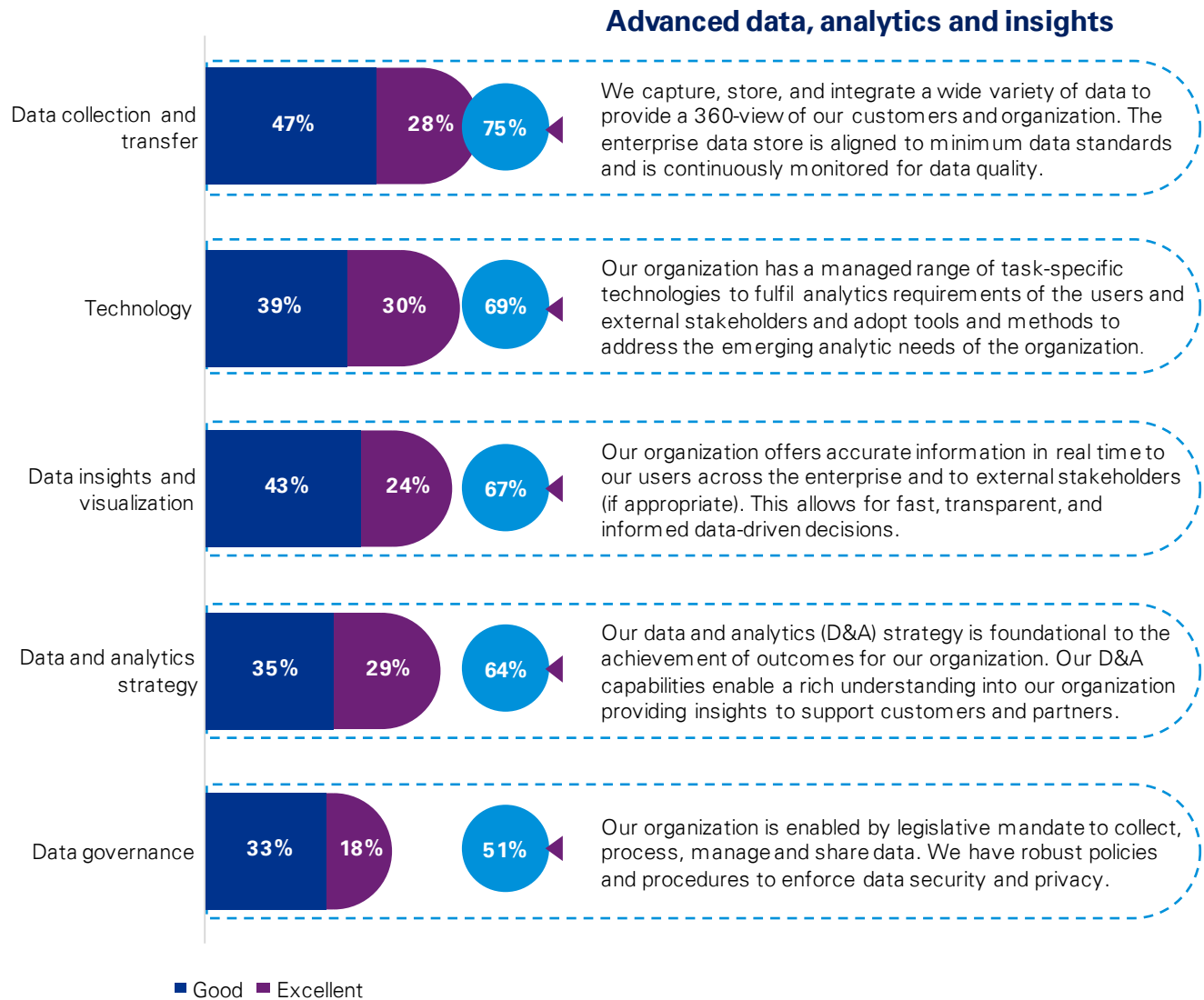**Regions surveyed and number of respondents:**

US (N=65), Canada (N=55), UK (N=60), Germany (N=60), Australia (N=55), India (N=50)

Study range: 5-21 December 2018

To participate in the survey, respondents met the following criteria:

— **Industry:** All respondents were part of human and social services agencies within government organizations and/or healthcare, human/social services, or nonprofit organizations that worked with, had a relationship with, or supported a human and social services government organization.

— **Organization size:** Organizations of any size were surveyed, with 64 percent of respondent organizations having 1,000 to 20,000 or more employees.

— **Job level:** 88 percent of respondents held positions at the project manager level and above (51 percent held director-level or higher positions).

— **Involvement:** All respondents were involved in making decisions around their organization's customer-centric strategy and enablement.

— **Prioritization:** Respondent organizations had to be prioritizing customer-centric strategies.

Please rate your organization on its ability to execute on the following objectives as they relate to its advanced data, analytics and insights.

Advanced data, analytics and insights

Data collection and transfer — 47% | 28% | 75%

We capture, store, and integrate a wide variety of data to provide a 360-view of our customers and organization. The enterprise data store is aligned to minimum data standards and is continuously monitored for data quality.

Technology — 39% | 30% | 69%

Our organization has a managed range of task-specific technologies to fulfil analytics requirements of the users and external stakeholders and adopt tools and methods to address the emerging analytic needs of the organization.

Data insights and visualization — 43% | 24% | 67%

Our organization offers accurate information in real time to our users across the enterprise and to external stakeholders (if appropriate). This allows for fast, transparent, and informed data-driven decisions.

Data and analytics strategy — 35% | 29% | 64%

Our data and analytics (D&A) strategy is foundational to the achievement of outcomes for our organization. Our D&A capabilities enable a rich understanding into our organization providing insights to support customers and partners.

Data governance — 33% | 18% | 51%

Our organization is enabled by legislative mandate to collect, process, manage and share data. We have robust policies and procedures to enforce data security and privacy.
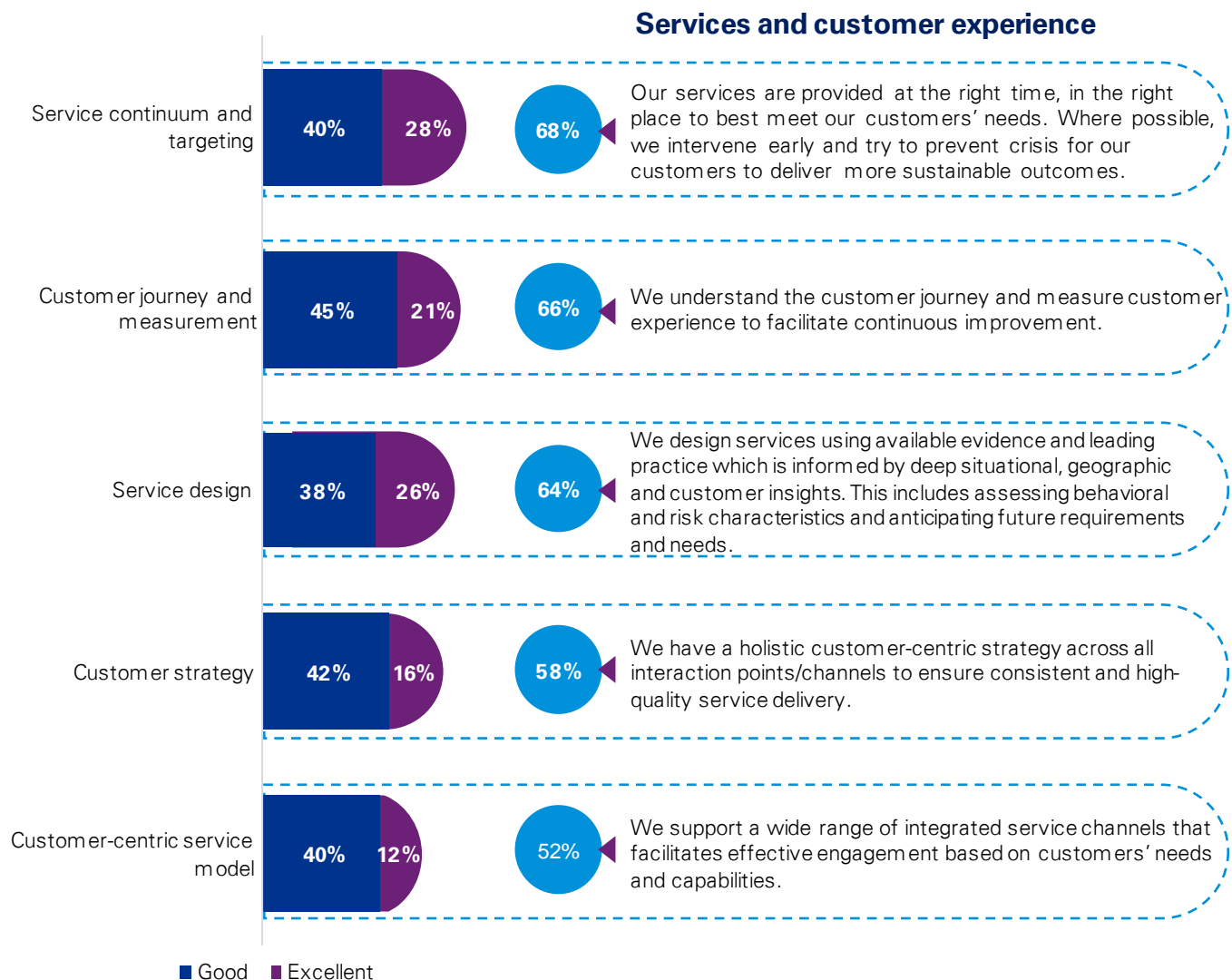
■ Good ■ Excellent

Source: A commissioned study conducted by Forrester Consulting on behalf of KPMG, December 2018.

Organizations also struggle to share information securely and obtain a real-time understanding of demand across their services, something which is made worse by the fact that data is housed in different formats and locations. COVID-19 has demonstrated that such information sharing is possible, with many organizations showing that they could respond quickly in sharing critical data to enable people to be supported efficiently.

Work to do on integrating customer services

Prior to COVID-19, 80 percent of organizations planned to invest further in services and customer experience capabilities.[4] Nearly 7 in 10 organizations said they were providing the right customer services at the right time, but just 5 in 10 said they did so through a range of integrated channels.[5]

Please rate your organization on its ability to execute on the following objectives as they relate to its services and customer experience.

Services and customer experience

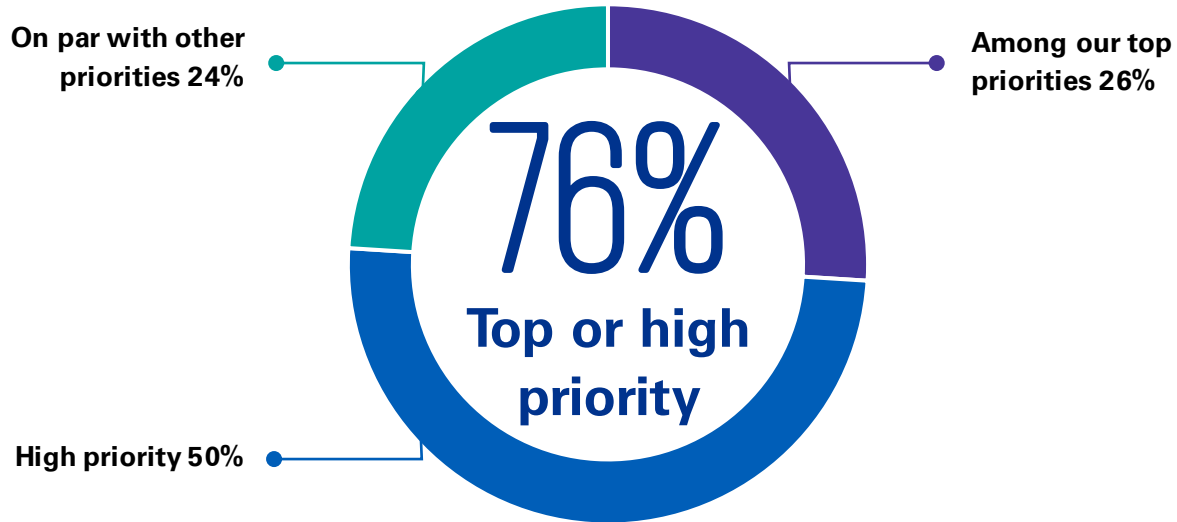| Category	Good	Excellent	Total	Description
Service continuum and targeting	40%	28%	68%	Our services are provided at the right time, in the right place to best meet our customers' needs. Where possible, we intervene early and try to prevent crisis for our customers to deliver more sustainable outcomes.
Customer journey and measurement	45%	21%	66%	We understand the customer journey and measure customer experience to facilitate continuous improvement.
Service design	38%	26%	64%	We design services using available evidence and leading practice which is informed by deep situational, geographic and customer insights. This includes assessing behavioral and risk characteristics and anticipating future requirements and needs.
Customer strategy	42%	16%	58%	We have a holistic customer-centric strategy across all interaction points/channels to ensure consistent and high-quality service delivery.
Customer-centric service model	40%	12%	52%	We support a wide range of integrated service channels that facilitates effective engagement based on customers' needs and capabilities.

■ Good ■ Excellent

Source: A commissioned study conducted by Forrester Consulting on behalf of KPMG, December 2018.
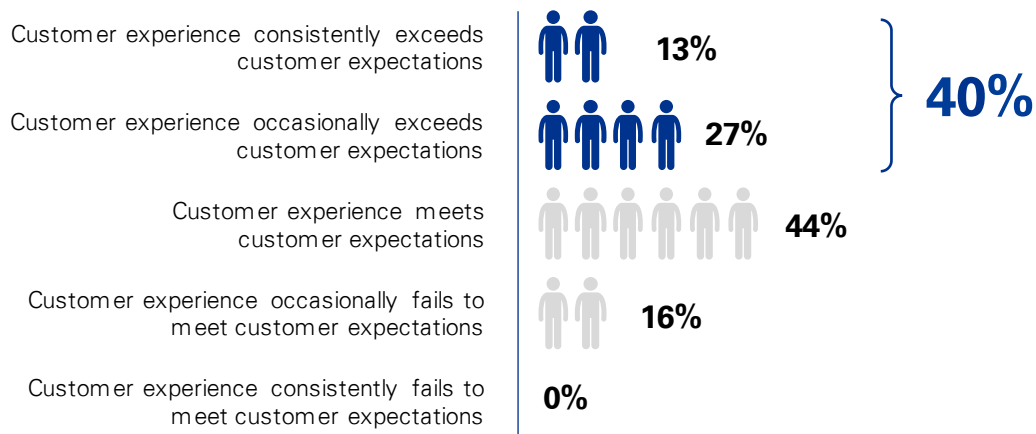
Two-fifths exceed customers' expectations

According to the research, nearly 8 out of 10 HSS organizations were making their customer-centric strategy a priority before the pandemic.[6] However, just 40 percent were going above and beyond in delivering on the customer experience.[7]

What priority is your organization placing on its customer-centric strategy?

On par with other priorities 24%

Among our top priorities 26%

76%
Top or high priority

High priority 50%

Source: A commissioned study conducted by Forrester Consulting on behalf of KPMG, December 2018.

To what extent does the experience your organization provides its customers meet customer expectations?

Customer experience consistently exceeds customer expectations — 13%

Customer experience occasionally exceeds customer expectations — 27%

40%

Customer experience meets customer expectations — 44%

Customer experience occasionally fails to meet customer expectations — 16%

Customer experience consistently fails to meet customer expectations — 0%

Source: A commissioned study conducted by Forrester Consulting on behalf of KPMG, December 2018.

Minority collaborate with other providers on integrated services

With regard to responsive operations, the KPMG International-commissioned research conducted by Forrester Consulting revealed roughly two-thirds or more had aligned their workforce, operational strategy and supply chain, but many were still working to integrate services with those of other providers.[8]

Please rate your organization on its ability to execute on the following objectives as they relate to its responsive operations.

Responsive operations

Supply chain and asset management
41% | 29% | 70%
Supply chain and assets are managed to meet service specifications and the current and future demands of our customers.

Market/ecosystem positioning
40% | 27% | 67%
We have a clear understanding of the market/ecosystem and are adept at analyzing and managing our role in the market/ecosystem.

Operational strategy
48% | 18% | 66%
Our operating model, business processes, human capital and service delivery are aligned to our overall organizational objectives.

Workforce optimization
44% | 21% | 65%
We have a workforce model that is sufficient and responsive to varying demands and changing environmental, social, policy and technology imperatives.

Service integration and coordination
28% | 25% | 53%
In order to meet our customers' needs, we collaborate with other providers to integrate our services.

■ Good ■ Excellent

Source: A commissioned study conducted by Forrester Consulting on behalf of KPMG, December 2018.

Many automate, fewer integrate technology

With regard to technology architecture and enablement, the 2018 research found that HSS organizations were focused on automating processes but should work harder on security, risk and technology architecture flexibility to make progress on reaching the service integration and optimization goals 5 in 10 lack.[9]

Please rate your organization on its ability to execute on the following objectives as they relate to its technology architecture and enablement.

Technology architecture and enablement

Automation and enablement — 42% | 30% | 72%
We are focused on automating processes to be more effective and efficient in responding to the needs of our stakeholders.

IT operating model — 45% | 23% | 68%
Our technology architecture and enablement is designed to be flexible, resilient and employs an agile, customer-centric mindset and practices.

Security and risk — 38% | 27% | 65%
Our technology stack is designed and built to be secure and to protect our data, systems and products. We use technology to manage and maintain security across all channels, inclusive of data and physical networking.

Enterprise architecture — 35% | 24% | 59%
Our enterprise architecture is flexible to support services, policies, organizations, functions and operations, moving at speed to meet current and future strategic objectives and needs of the organization.

Service integration and performance — 39% | 12% | 51%
We optimize integration of various technologies (by third parties, vendors etc.) with our core technology platforms — managing our technology services to coordinate and support a high level of performance and organizational resilience.

■ Good ■ Excellent

Source: A commissioned study conducted by Forrester Consulting on behalf of KPMG, December 2018

The impact of COVID-19

COVID-19 has fundamentally changed the way society works, including the way it can support vulnerable and disadvantaged groups. Human and social services organizations have been forced to transform and cope in new operating environments.

According to Forrester Consulting research commissioned by KPMG International in 2020, four-fifths of HSS organizations now see digitally enabled technology architecture as a top or high priority.[10]

Capabilities	Top or high priority in digital transformation
Digitally enabled technology architecture	**81** percent
Experience centricity by design	**71** percent
Aligned and empowered workforce	**66** percent
Integrated partner and alliance ecosystem	**63** percent
Insight-driven strategies and actions	**60** percent
Responsive operations	**53** percent
Seamless operation	**40** percent
Innovative services	**39** percent

Source: Commissioned study conducted by Forrester Consulting on behalf of KPMG International, May-July 2020.

About the research

2020 COVID Digital Transformation Study

Between May and July 2020 KPMG International commissioned Forrester Consulting to further explore how 12 sectors (including human and social services) were responding to COVID-19, along with the pandemic's impact upon digital transformation and how organizations were positioning themselves for success in the new reality.

Through this research 780 digital transformation strategy leaders in 10 countries and territories were surveyed online.

HSS organizations have been significantly impacted by the global COVID-19 pandemic. The 2020 research has also revealed that HSS organizations have faced a range of disruptions to their business operations, with roughly a third reporting reductions in salaries, increased security risks, increased need to reduce costs, losses of revenue or shifts to a remote workforce.[11]

The sector is also experiencing a range of disruptions in the demand for services and supply of inputs and labor. Among others, these include insufficient supplies of personal protective equipment (PPE) that have put the care workforce at physical risk; trauma likely to have an effect on the mental health of the workforce, as well as an increasing demand for related services; and mass unemployment putting significant pressure on the systems designed to support people who are out of work.

In the wake of these challenges, HSS organizations are scrambling to recalibrate their operations. While only 13 percent had a formal strategy to transition from the pandemic reaction phase to recovery, at the time of the survey, 66 percent were working on one.[12] Seventy-one percent of HSS organizations have had to moderately or significantly accelerate elements of their existing digital transformation strategies due to the pandemic while 67 percent have moderately or significantly increased their digital transformation budget.[13]

These challenges have brought public and political attention to HSS issues, and governments have been under pressure to act. HSS is in the spotlight and leaders need to make use of this opportunity.

"Many of the challenges posed by the COVID-19 pandemic are simply accelerating trends that we already saw in the sector. Pressures for governments to do more with less, workforce limitations and the need to embark on digital transformation are not new, but they are now firmly in the public eye."

— **Nilachal Mishra**
Partner, Head of
Government Advisory,
KPMG in India

A window of opportunity

While the impact of COVID-19 has been tragic and has added pressure to an already challenging environment, there are many positives that can be taken from how the sector has responded:

Elements of services have been provided virtually. Where effective, this approach can make services quicker and easier while freeing up time and cost for care that requires personal contact;

In many places, integrated government responses have embedded close working relationships between different parts of government that support vulnerable groups;

In many jurisdictions, the care workforce has received unprecedented societal support and there is a better understanding of the real value of these support systems;

The urgency of the pandemic has forced organizations to break down barriers that previously blocked activities that support efficient working such as data-sharing; and

Community engagement has significantly increased, which may offer an alternative route to maintaining popular services that do not have sustained government funding;

Emergency funding has forced services to be designed rapidly around what customers need.

COVID-19 has fundamentally altered many elements of society, including how human and social services are provided. There has been rapid and positive change in response to the pandemic, and HSS leaders should look to maintain momentum. Technological developments have filtered through from the private sector and HSS providers now could use these to leapfrog ahead, supported by digital delivery, wearable technology, advanced data insights and 5G connectivity and empowered by the new role for HSS in society and the economy.

KPMG Connected Enterprise for Human and Social Services

In KPMG International's 2018 Listen, Learn, Lead report, 44 percent of HSS leaders stated that developing affinity with the customer was their highest strategic priority.[14] Separate research commissioned by KPMG International and conducted by Forrester Consulting in the same year found that nearly 80 percent listed it among their strategic priorities.[15] But for many this is an aspiration rather than a reality, with just 40 percent of respondents in the latter research reporting that their organization currently exceeded customer expectations,[16] despite most HSS staff unsurprisingly wanting to spend more time with customers, something that they are trained to do and for many a key motivation in their jobs.

By focusing on the customer, the KPMG Connected Enterprise for Human and Social Services framework can unlock employees' inner social workers and deliver what their customers want and need. The framework sets out a roadmap to connect the front, middle and back offices to enable back office teams to support frontline delivery. This means rostering systems that allocate the time staff need to spend with customers and human resources functionality that provides staff with the support required to deal with challenging and emotional situations. Building such an enterprise means breaking down the barriers and silos within HSS organizations and connecting them to the needs of those they serve.

The primary customer is clear. Vulnerable and disadvantaged people and those around them in their support system need timely access to high quality care and support to enable their health, wellbeing and prosperity. However, HSS organizations serve others including communities, government, funders and partner organizations.

Government

"Care and support needs to be available at the right time and in the right place"

Communities

"The needs of vulnerable and disadvantaged people must be met"

Funders

"I want to ensure that my investments deliver the intended results"

In responding to these partner and stakeholder customers, HSS organizations need to avoid focusing on departmental structures, cost centers or on operational staff in isolation, as this will likely not provide the fundamental, transformational change that is needed.

In 2018, KPMG International commissioned Forrester Consulting to conduct a study on customer-centric strategy decisions across 17 industries.[17] This research showed that firms that make a moderate or significant investment in all eight capabilities (see next page for list) are 2.1 times as likely to deliver a customer experience that exceeds expectations, and achieves return on investment on one or more metrics. These capabilities are built into the KPMG Connected Enterprise for Human and Social Services framework. Understanding your organizational maturity against these capabilities highlights where to focus and what to prioritize.

Transformation capabilities and where human and social services transformation is taking place

Few human and social services leaders would challenge the importance of putting the customer at the center of their organization, though in reality many organizations still have much work to do.[18] Bridging the gap between KPMG's vision of connected care and support provided by a technology-enabled and customer-centric HSS organization and the current situation is not something that can be done quickly or easily, but defining this vision is an important step to take.

An organization that can successfully navigate changes in the sector will need to align people, operations, systems and processes with an enterprise-wide customer experience strategy. Organizations that understand their customer cohorts, journeys and experiences will be able to support them more effectively. Those who align their back-office functions to support delivery of positive outcomes will be able to do so more efficiently.

As an example, many agencies that provide unemployment support have seen the number of applicants double during pandemic shutdowns. Many are unemployed as a result of the closure of businesses caused by the impacts of COVID-19, particularly in sectors such as hospitality. If initial questions on the application form identify someone in this situation, many further questions can be removed to streamline the process, improving their journey through the system, reducing processing time and cutting the risk of error.

The research-informed eight critical capabilities that an organization requires in order to become more customer-centric[19] and successful in navigating future challenges, including the changes brought by COVID-19, are as follows:

1 Insight driven strategies and actions

2 Innovative services

3 Experience centricity by design

4 Seamless interactions

5 Responsive operations

6 Aligned and empowered workforce

7 Digitally enabled technology architecture

8 Integrated partner and alliance ecosystem

The next page features descriptions of these capabilities and spotlights from around the world of organizations that have undertaken or are undertaking transformational change.

1. Insight driven strategies and actions

This capability involves using data, analytics and insights to develop a real-time, multi-dimensional view of the customer to inform strategy and allow personalization.

A successful data and analytics strategy may involve:

— Data governance that ensures operations are enabled by a legislative mandate to collect, process, manage and share data, underpinned by robust policies and procedures to enforce data security and privacy;

— Procuring task-specific technologies;

— A technology strategy aligned to the organization's goals;

— Empowering staff by enabling everyone to see and use the data they need to do their job; and

— Embedding data insights in workflow through self-service dashboards. This can help staff better understand people who do not communicate in typical ways such as children or some people with disabilities. Such insights must be shared with all stakeholders, including the customers themselves.

Spotlight: Targeting disadvantaged communities with data in Australia

In 2018, the Australian Government's Department of Social Services announced its Stronger Places, Stronger People (SPSP) initiative.[20] This aims to demonstrate whether a place-based and collective impact model can help local communities achieve the best life outcomes for children and their families through funding targeted at communities with disproportionate disadvantage.

The department required robust evidence to demonstrate the economic case for SPSP. This included the development of enabling tools and frameworks to help government and communities prioritize their focus and investment — ultimately achieving greater productivity out of the service system.

KPMG Australia used a place-based lens to help the department to better understand the extent and cost of disadvantage by:

— Establishing a framework by which to understand and define disadvantage

— Identifying measures and corresponding data sources to estimate the extent and cost of disadvantage; and

— Triangulating data to generate key insights in relation to the extent and cost of disadvantage through reports and in-depth community profiles for 10 demonstration communities (including tracking key markers of disadvantage across the life-course).

The data generated from this analysis formed a critical input to the government's considerations in terms of targeting and optimizing the policy design and implementation to maximize outcomes for vulnerable communities.

"To gain true value from human and social services data, organizations must be positioned to capture, share and analyze it in meaningful and consistent ways. Given the sensitivity of data in this sector, robust cybersecurity will also be a critical consideration."

— Kerry McGough
Partner,
National Health and Human Services,
KPMG Australia

2. Innovative services

This capability enables organizations to develop innovative business models and services for specific customer segments. Developing an innovative approach to HSS begins by working with the community to identify and understand current and future care needs.

This includes using data to understand:

— Incidence and prevalence of vulnerability;

— Potential service need;

— Past and present patterns of service utilization; and

— Future changes to population composition.

Projected demographic, social and economic characteristics of the community will contribute to this, as will qualitative information having been obtained through working closely with the community.

The services that truly 'shift the dial' will be focused on early intervention, to prevent crisis for customers and deliver more sustainable outcomes. They can be incentivized through payment based on outcomes, which will reduce the costs of high intensity crisis care. Early intervention means identifying risk indicators, with evidence, leading global practice and service models from other industries providing reference points, along with deep situational, geographic and customer insights.

To create flexibility and responsiveness, co-design approaches can ensure that new delivery models are tested, piloted and developed in response to customers. Planning must be dynamic and use data and evidence to ensure that the services intervene early and are needed. Services must empower customers, wherever possible, to exercise choice in provider and enhance control of their care.

This iterative approach to service design will only be successful if accompanied by mechanisms for collecting and evaluating inputs and customer outcomes. Continuous improvement should shape future policy and service design, led by consultations with customers.

Spotlight: Putting counselling support for women online in Canada

As a result of the pandemic, the Violence Against Women (VAW) sector has quickly moved to online counselling. For example, in the province of Ontario, Ottawa-based service providers have joined up to launch a support platform. Clients can text, call or use a computer chat function to speak to counsellors and get referrals for other services.

Anecdotally, the transition to more virtual services has been well-received by crisis centers, shelters and clients. Shelter and crisis center staff have told the provincial ministry that virtual service delivery allows them to be more efficient and serve more clients. Clients themselves have welcomed the change as they no longer need to travel to access support services. By making service delivery more virtual, providers have expanded the entry point for the sector. Virtual services can provide a way for clients to get support and assistance with safety planning early or where they may not have otherwise. This may be preferable to shelter services as an entry point — shelters are not appropriate for all clients and are highly costly as a first intervention.

The HSS sector in Ontario has also been transformed in other ways. Pandemic restrictions on movement and physical contact have led to opportunities to leverage existing community networks to deliver services to remote and often vulnerable communities. HSS providers who work with remote Indigenous communities, for example, have modified their delivery model to assign certain duties to local community leaders. These duties include delivering groceries and medications, carrying out in-person wellness checks, and assessing the risk of harm. The person carrying out these duties on behalf of the service provider does not operate with full statutory authority, however they retain the ability to escalate any potential issues to the provider.

These practices, which are more informal and less stigmatized than the traditional service delivery model, could result in harm reduction, reduced escalation and decreased service delivery costs. The provincial ministry is looking to understand these interventions better by undertaking evaluative research — although the organization notes that the findings may be difficult to disentangle from the pandemic circumstances.

> "There is a real opportunity to embed rapid, agile service design into the DNA of human and social services organizations. Creating such a culture of innovation, in a safe environment that protects the needs of vulnerable people, could see exponential benefits for end users."
>
> — **Martin Joyce**
> Partner,
> National Human and Social Services Leader,
> KPMG in Canada

3. Experience centricity by design

This capability helps organizations design and provide a seamless and personal experience for customers, employees and partners, including customer-centered services.

Organizations should take the perspective of the customer. By tailoring services to their specific needs and desired outcomes, they can offer more integrated and effective responses. They should develop a strong sense of their customers' needs by working with them to identify the care that will best suit them while enabling them to exercise choice and control throughout the process. This includes offering a strong referral network, which can provide access to care that is outside the scope of an individual provider's services so that customers can access the full range of care that they require.

HSS providers can better understand customer needs by mapping interactions along different entry points and scenarios, to track the multiple ways that customers may interact with the service. For most organizations, this experience map is likely to demonstrate that a range of analog and digital channels are needed to meet customer preferences and accessibility requirements.

Mapping and digitizing customer engagement processes can lead to improved services, increased caseworker interaction, quicker flows of data, greater staff satisfaction and reduced costs of operations. For example, the health check for two-year-old children by Salford City Council's Children's Services in the UK previously took an average of 148 minutes to complete, including only 41 minutes of family contact time and 23 separate forms and pieces of paper. Digitally transforming these services with a focus on mobile working freed an average of 2 hours and 13 minutes of time, for each practitioner every day, the equivalent of providing 1 day a week in productive time per worker and investing £2.7 million (or US$3.6 million) in the service.[21]

In the future, many services will be supported remotely via telehealth, wearables and app-based monitoring. Assessments using these devices will enable staff to focus on people who need personal care and support, rather than them carrying out a compliance-based system of checks. Within the home, use of robotics and the Internet of Things (IoT) could help support dignified and independent lifestyles.

To avoid damaging rapport during a conversation and save writing them up afterwards, caseworkers may be able to use natural language processing tools to record conversations and convert them into notes. Electronic case files could be reviewed by artificial intelligence to identify links, such as a car license plate that appears in multiple child protection cases. Ethical barriers of privacy, confidentiality and consent must be respected, but within that framework organizations should look to gain insights from technology.

As well as the channel, the nature of engagement with the customer is also critical in tailoring services to their needs. This means shared decision-making, co-designing care plans and taking a strength-based approach to care that utilizes an individual's capabilities. Staff must be trained in these approaches, which may be markedly different to existing models of care.

Spotlight: Using tablets for in-home care in Finland

The City of Helsinki provides remote in-home care to clients via a tablet device, linked to a center staffed by trained nurses and doctors.[22] A healthcare professional contacts the client via this simple user interface at agreed-upon times, and clients may also contact the service when needed.

The remote care service helps clients with aspects of their everyday lives such as medication reminders. Critical social contacts are also provided, with joint mealtimes in conjunction with other clients, and the ability of families to contact their loved ones through the same device.

"Providing options for both staff and customers to engage with their healthcare will improve the entire experience. Staff will be given extra flexibility to perform their roles and minimize low-value tasks, while customers can engage with caregivers and provide data through the channels that work best for them."

— **Torsten Müller**
Partner, Advisory,
KPMG in Germany
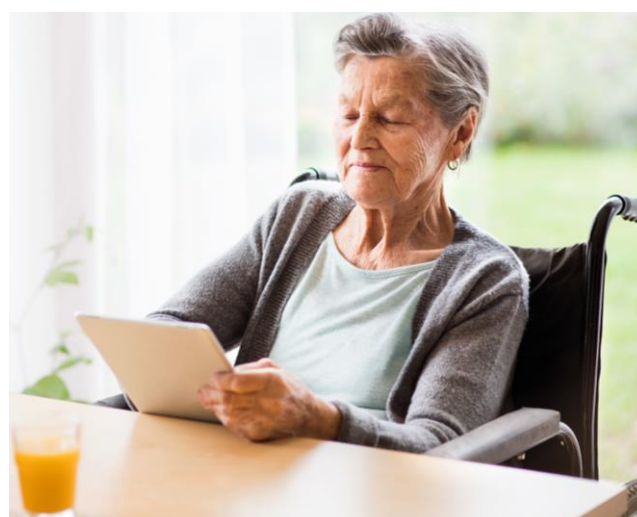
4. Seamless interactions

This capability allows organizations to interact with customers across communication and service domains in a trusted, personalized and integrated manner. Communications must be tailored around the customer's preferences, with integration of an organization's channels to develop a single customer profile. This information must be held securely, but also be accessible as appropriate to inform communication, service design and delivery.

A 'tell me once' approach should allow customers to state their communication preferences once and have these applied to all future interactions, with the same approach for intake and referral processes and their service or care plan. Moving through the process or between plans or services should also be seamless. Customers must have a comprehensive range of channels to choose from including secure digital channels as well as traditional methods.

KPMG research[23] has identified that despite regulatory and cultural limitations, forward-looking organizations will take advantage of decreasing technical barriers to achieve such a seamless customer experience. This can include:

— Engaging with customers via organizations with which they already interact, instead of requiring customers to come to them, such as by displaying benefits information through customers' banks rather than requiring customers to log into a government system;

— Adopting trusted digital identities to offer multiple services through one portal; and

— Deploying phone and online platforms and communities of social services practitioners to engage customers remotely rather than requiring their physical presence.

By removing barriers to talking, conversations with support workers can have more impact and help them to build rapport. These conversations are more likely to be useful for the customer and support good outcomes, rather than time-starved, light touch interactions.

As a result of COVID-19, to meet demand and maintain services many interactions are being carried out online or remotely in a way that was hard to imagine pre-pandemic. There had been a gradual movement towards remote delivery, but the slow pace of change was preventing organizations from seeing significant benefits. But maintaining services during the pandemic has forced organizations to work out what can be delivered effectively online, via an app or over the phone. Leaders should look to maintain and build on these kinds of efficient delivery by automating processes where they can.

Some services such as remote care cannot be delivered entirely remotely. However, this strengthens the need to explore remote delivery of supporting elements such as communications or regular check-ups. The cost of providing a caregiver to help someone to get out of bed cannot be reduced, so organizations need to reduce costs in other areas to maintain those critical services.

Spotlight: Integrating clinical care with community services in the US

A healthcare provider and not-for-profit health insurance organization has partnered with a technology company, to create a program that aims to improve the health of plan members and their communities. This program connects healthcare and social services providers to address pressing social needs including housing, food, safety and utilities. Through this partnership healthcare providers and caregivers have unparalleled capabilities to seamlessly match an individual's social needs with the appropriate services from within a robust network of nonprofit, public and private resources.

"Navigating across the human and social services system should not be a daunting experience for customers. The technology now exists to weave together their engagement with interlocking service providers, in a way that does not create additional burdens."

— **Harvey Levin**
Managing Director,
Health and Government Solutions
KPMG in the US

5. Responsive operations

This capability helps organizations carry out their customer strategy in an agile, consistent and operationally efficient manner by using advanced analytics.

Future-focused HSS organizations must engage their frontline staff to improve. This means providing staff with the necessary capabilities, tools and permission to support improvement, and leaders that support improvement through leading by example.

Strategic sourcing and group procurement agreements can allow process automation and technology to provide products and services in a cost-effective fashion. A clearly-defined procurement strategy that includes category management should govern this approach, including assessment, monitoring and managing of potential risks including continuity of supply — a key risk during the pandemic.

The flow of goods and services must be managed in an effective and efficient manner to provide support and care, optimizing working capital and materials held across the organization. The organization's supply chain, logistics and working capital strategy should assess its performance against defined measures and must be agile enough to rapidly respond to volatility in the operating environment by using predictive supply chain data and analytics. Real-time data, analytics and IoT applications can be used to monitor and control the supply chain in order to reduce waste, optimize performance and enhance customer experience. Business continuity plans are critical in ensuring that the performance of the supply chain, logistics and working capital are maintained in the event of critical incidents such as the pandemic.

Integrated supply chains must be informed by a single view of the customer, a comprehensive understanding of their needs, and the capacity to deliver a seamless service experience across the entirety of an organization's divisions and partner network.

More efficient and aligned middle and back office operations can help fund better service quality. Data can also help governments and providers tackle fraud, waste and abuse in the system. A single view of the customer and connected datasets will allow services to better manage programs based on compliance or eligibility, while augmented intelligence systems can help identify potential fraud, allowing resources to be focused on serving the right customers at the right time.

Spotlight: Using technology for COVID-19 income support in Australia

In Australia, a large federal government agency implemented a range of income support measures as part of the country's COVID-19 response. This required new legislation, significant system modifications and technical implementation and large-scale mobilization of resources, all in a very rapid environment.

KPMG Australia provided back and middle office insights such as reports on daily risks and issues, legislative coverage considerations, and technical business solutions, implementation and release readiness. These insights enabled the agency to work at pace with a stronger risk appetite and resolve issues in an agile manner.

Disciplined daily reporting was underpinned by evidence and insight, enabling the agency's executive to make decisions with confidence and accelerate issues resolution all while reporting with confidence to the stakeholders across government. The new process also provided valuable time to strategically address post go-live processes and accelerate the use of technology.

> "Human and social services organizations operate in a high-risk environment, with consequent reporting and compliance obligations. Given this context, it is critical to align the back and middle office — not only to ensure that important insights and risks do not slip between the cracks, but also to free up limited resources for front-line delivery."
>
> — **Nilachal Mishra**
> Partner,
> KPMG in India

6. Aligned and empowered workforce

This capability helps to create a customer-centric organization and culture, including ongoing development of skills and a nimble, empowered workforce with aligned performance management.

In order to attract the best workers, the organization's leaders must actively seek feedback and respond to it positively by learning from it. They must also be inclusive role models for the values and behaviors they expect of their staff and are able to appeal to and motivate diverse teams. This includes creating a 'safe-to-fail' culture that allows for innovation.

Every role within the organization should have a clear line of sight to the organization's vision and strategy and how it serves the customer. The organization should support and promote change, with clearly articulated vision and values underpinned by measures of outcomes communicated to staff. Individual and team performance should be aligned to these measures.

Structures and roles should be designed to facilitate working across the organization, allowing real-time responses to changes in expectations and demand without impacting strategic goals. There should be effective mechanisms for employees from both traditional and innovative parts of the business to collaborate with each other. The organization should have a talent strategy to attract and retain diverse workers and must provide enough training and supervision for employees to deliver on the changing needs and expectations of customers.

Spotlight: Addressing workforce challenges in Australia

In Australia, KPMG is working with a social services organization to address its workforce challenges (many of which have been exacerbated by COVID-19) by helping the client:

— Establish resources for service providers

— Develop an online forum for community sector workers

— Facilitate an online labor exchange

— Provide digital transition support

— Develop effective response scenario plans

"The human and social services sector's greatest asset is its motivated and mission-driven workforce. A great challenge for organizations is how to maintain this motivation while supporting the workforce to embrace the use of technology to support improvements in care as well as efficiency in an increasingly competitive environment."

— **Ben Wallace**
Partner,
Management Consulting,
KPMG Australia

7. Digitally enabled technology architecture

This capability allows organizations to design and build intelligent digital services that serve customers in an agile, cost-effective, scalable and secure manner.

Flexible and resilient technology serves as the foundation for all the other capabilities of an effective organization. It underpins analytics, enables the workforce, supports service delivery and connects the organization. But most organizations say that their current technology prevents service integration and improvement.[24]

A successful technology architecture must be well-governed, meeting the overall goals of the organization, and developed with an innate understanding of the needs of the organization's people and the cadences of its business cycles.

Frequent testing and quality assurance will let the organization respond promptly to changing requirements such as the shift to digital delivery during the pandemic. This agility is necessary to keep pace with the demands of customers using the technology.

In HSS, an effective technology architecture must also integrate the full range of technologies that may be required to deliver for customers. This will often include managing a mixture of third-party vendors and core technologies to support a high level of performance and organizational resilience.

Processes should be automated where appropriate, to be more effective and efficient in responding to stakeholder needs. This will help reduce costs, and develop the efficiency, scale and responsiveness needed for organizations to meet ever-increasing customer needs.

The pandemic has led many organizations to adopt a 'digital first' approach to working with customers, stakeholders, workforce and other care and support providers. This approach should be supported by strong security, privacy and risk safeguards that protect data, systems and people as well as alternatives that reflect digital inequalities.

Spotlight: Virtualizing hands-on care in Canada

Empowered Kids Ontario (EKO) represents the publicly funded child development and rehabilitation sector in the province of Ontario. COVID-19 compelled the organization to ask how its members and the province's public sector kids autism providers — known and valued for providing compassionate, hands-on services — could quickly innovate to expand virtual care. With EKO's initiative the sector is reimagining service delivery now and in the future.

EKO's Virtual Care Resource Guide and accompanying telehealth training has enabled its members to quickly integrate or expand virtual care in their suite of services. Whether technological change has already been re-shaping members' programs or digital services are just being

introduced, the resource guide supports organizations at every level — from decision-making, to liability, acquisition, implementation, costing, communication, privacy and measurement.

EKO also partnered with behavioral health experts at a regional healthcare provider to provide telehealth training so EKO members could develop competence and equip their teams to make clinical decisions in this service model. To date 2,346 clinical frontline staff at 47 member organizations across the province have participated and report a rise in comfort level with the video conference platform from 31 to 80 percent.

> "Digital delivery should be at front of mind when human and social services organizations consider their strategic priorities and enablers. A robust and coordinated digital delivery can accelerate benefits for customers in a way that has not been possible in the past."
>
> — **Ruth Morgan**
> Head of Local Government,
> KPMG in the UK

8. Integrated partner and alliance ecosystem

This capability involves identifying, integrating and managing third parties to increase speed to market, reduce costs, mitigate risks and supplement gaps in an organization's capability in delivering services to customers.

Regardless of structure, there are clear capabilities that will enable effective service delivery:

— A tight focus on individual customers

— Monitoring to predict and intervene in a proportionate manner

— Converting data into insight to inform services

— Having fit-for-purpose technology for fully digital and agile working

— Being interconnected across the HSS ecosystem

— Managing the market and their place in it

— Having a blended workforce connected to specialists

To consistently deliver all these capabilities, HSS organizations need a strategy to identify partners, alliances and vendors that can address capability gaps. Without this focus on collaboration in the best interests of customers, it will be difficult to deliver high-quality services for customers.

Organizations should also have efficient processes to commission, start work with and decommission partners, alliances and vendors. These should include ways to manage quality, risks and costs that continually assess the performance of partners, to ensure that value chains are agile, responsive to the needs of customers and able to increase efficiency while delivering outcomes. Organizations should have a dedicated vendor management team to manage this review process, with vendor risk managed through the contract negotiation process.

HSS organizations need robust mediation, arbitration and dispute resolution mechanisms for existing partners, as well as ensuring they comply with industry standards and regulations. They need the ability to conduct due diligence on potential partners while effectively managing post-merger integration. A variety of different transaction options and structures may be required depending on the partners, as well as rigorous divestment capabilities for ending partnerships.

Spotlight: Reforming disability and family support in Australia

Specialist Disability Accommodation (SDA) supports people with a disability with significant functional impairment and/or very high support needs who require integrated housing and supports to meet their needs. The Australian National Disability Insurance Scheme (NDIS) has an SDA Pricing and Payments Framework, [25] creating a marketplace for providers, investors and participants to interact in order to achieve the most efficient and innovative models of integrated SDA delivery.

The framework sets out the policy position and objectives for pricing and payments arrangements for SDA, providing initial guidance to drive market investment and achieve growth in supply required to meet expected demand. The

market is now developing and maturing — in the short term it will be immature, with market behaviors becoming embedded in the medium term and a diverse, mature and competitive marketplace emerging in the next 10 years.

Meanwhile in the country's most populous state, New South Wales, the government embarked on a landmark reform process called Their Futures Matter.[26] The reform aims to enable all children, young people and families to reach their potential, and improve outcomes for those experiencing vulnerability. Its investment approach is central to the reform and aims to provide a more child and family-focused system that is easier to navigate and brings together services from across government portfolios.

> "The human and social services sector increasingly requires a suite of highly specialized skills to meet complex client needs. Often no one provider or agency is positioned to meet the full range of client demands, but successful service delivery means going to customers with the right mix of partners who can."
>
> — **Liz Forsyth**
> Global Head of Government, Healthcare and Infrastructure and Global Lead for Human and Social Services, KPMG

The path to connected care and support

Transforming any organization is difficult but particularly when it serves some of the most vulnerable members of society. There are many challenges facing the sector and knowing how to start an enterprise-wide transformation process is daunting.

Understanding where you are today

The first step towards transformation is a thorough understanding of an HSS organization today. Leaders need to strip away structures, departments, teams and titles to understand the key functions of the organization and critically appraise how well they work.

HSS leaders need to ask themselves:

— Do we really understand the people we serve, and do we capture that information?

— How effective are the services we provide and how do we know?

— Does technology help and empower our work as well as it could?

— How can we better use data and convert it into improvements that our customers see?

— Does our workforce have the right skills to deliver in a digitally transformed organization?

HSS leaders everywhere are struggling with the same profound questions concerning quality of care, customer experience, staffing, costs and more. Enterprise-wide, consumer-centric digital transformation is the inevitable solution.

Supporting your transformational journey

KPMG firm professionals use their experience and deep understanding of human and social services — coupled with our insights from transformation in other industries — to work with clients to demystify future opportunities and turn them into actionable next steps in a digital transformation journey.

KPMG Connected Enterprise for Human and Social Services is different because it's a globally validated, research-based[27] framework. The framework can also help accelerate large-scale transformation to address bigger system issues instead of smaller incremental fixes. Using the framework, KPMG HSS specialists can help identify how a care system's key elements align with desired consumer experiences. This is done through a series of tools that distil the research[28] into actionable insights, including:

— A **maturity diagnostic** that enables organizations to assess their current maturity against each of the eight critical capabilities

— An **enterprise on a page** model that maps the elements of a best practice HSS organization with connected front, middle and back office and allowing leaders to understand where transformation needs to take place

KPMG Connected Enterprise for Human and Social Services

Enterprise on a page

Customers and stakeholders
Citizens, government, communities, funders

Channels
In-situ (home/community), mail, email, internet, portals, branches, offices, contact centers, mobile, telepresence, assistive technologies

Diversity of services
— Children, young people and families
— Indigenous people and communities
— People who are unemployed, elderly, homeless, carers, migrants, and experiencing domestic violence
— People with disabilities, their families and those with complex needs

Enterprise strategy
— Strategic ambition: community need, vision, purpose, values
— Corporate strategy and operational plan
— Performance measurement and reporting

Service continuum:
— Universal services
— Prevention programs
— Early intervention
— Secondary interventions
— Tertiary interventions

Core business practices
— Customer engagement
— Referral, intake and assessment
— Care planning and delivery
— Quality and safeguarding
— Service design and planning
— Ecosystem relationships
— Funding and reimbursement

Advanced data and analytics
— Technology and architecture
— Data collection and storage
— Governance and compliance
— Analytics and algorithms
— Visualization and insights

Enabling business practices
— Enterprise operations
— Enterprise technology

Contact us today to get a maturity assessment of your organization's consumer-centric capabilities and insights into how your care system can become more connected.

Some or all of the services described herein may not be permissible for KPMG audit clients and their affiliates or related entities.

Author and contributors

Liz Forsyth
Global Head, Government, Healthcare and Infrastructure
Global Lead for Human and Social Services
KPMG
T: +61 2 9335 8233
E: lforsyth@kpmg.com.au

In her role, Liz oversees a global network of more than 5,000 government, healthcare and infrastructure consultants in KPMG firms in more than 140 countries and territories. She uses global and local insights to help firms' clients address challenges with the aim of producing better outcomes for citizens and the communities where they reside.

Liz has more than 15 years' public sector work experience. She started her career as a social worker and then moved into management consulting. Liz joined KPMG in 2002 and established the Australian firm's Health, Ageing and Human Services practice and went on to lead the sector at a national level in 2013 for five years.

Liz's driving passion is health and social policy reform. Her work has predominantly focused on issues related to disadvantage, disability and vulnerability. This work has included strategy, policy development, program design and reform, service improvement, resource allocation and funding methodologies and evaluation.

Report contributors

Michael Camerlengo
Partner, Head of Government
KPMG Asia Pacific
T: +852 2522 6022
E: michael.camerlengo@kpmg.com

Nilachal Mishra
Partner, Head of
Government Advisory
KPMG in India
T: +91 124 669 1000
E: nilachalmishra@kpmg.com

Kerry McGough
Partner, National Health
and Human Services
KPMG Australia
T: +61 2 9335 7485
E: kmcgough1@kpmg.com.au

Hanan Alowain
Director
KPMG in Saudi Arabia
T: +96 611 874 8500
E: hananalowain@kpmg.com

Martin Joyce
Partner, National Human and
Social Services Leader
KPMG in Canada
T: +1 416 218 7976
E: martinjoyce1@kpmg.ca

Ruth Morgan
Head of Local Government
KPMG in the UK
T: +44 (0) 777 501 9375
E: ruth.morgan@kpmg.co.uk

Torsten Müller
Partner,
Advisory
KPMG in Germany
T: +49 711 9060-41564
E: torstenmueller@kpmg.com

Harvey Levin
Managing Director,
Health and Government Solutions
KPMG in the US
T: +1 401 528 2602
E: hblevin@kpmg.com

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