Necessity may be the mother of invention, but in the UK public sector, necessity is the mother of re-invention. Battered by two successive rounds of budget cuts, and facing a third round in 2015, public bodies are having to re-invent the way they operate in order to survive.

The GOSS Interactive Channel Shift Strategies Survey is the largest UK survey of public sector organisations’ drive to deliver better services through online channels. This year’s survey reveals the extent to which a ‘Digital by Default’ or ‘Channel Shift’ mindset has taken root in the public sector.

We see organisations taking a far more strategic, top-down approach to Channel Shift, recognising it as the only way to make the huge efficiency savings that will allow them to continue to deliver the levels of service their customers need and expect.

Re-inventing processes for a mobile-first world

Organisations are no longer just moving existing processes online. They’re actually re-inventing them from scratch for digital – and increasingly mobile – delivery. This helps avoid past failures such as where paper forms ended up as confusing multi-page online forms that were difficult to complete on smartphones.

The costs of this kind of Channel Shift failure mount up. In 2014, Socitm was seeing 12m failed online transactions per month across the UK’s 433 local authorities. If each of those failed transactions resulted in a call, this could add up to £368m in total, or £849,808 per authority each year.

That kind of inefficiency is clearly no longer affordable.

A real sense of excitement at the digital opportunity

At GOSS we’ve seen a massive surge of energy first-hand, as Channel Shift champions from across the UK public sector have signed up to share their advice, experiences, concerns and best-practice processes in our Forms & Process Community – and we welcome new members.

Whilst a challenge, there is still a great opportunity for public sector organisations to deliver excellent customer experiences to the 46% of users on mobile devices. With that figure almost certainly due to top 50% during 2015, there’s never been a better time to re-invent public sector delivery for a mobile-first age. This survey shows the UK public sector is enthusiastically rising to the challenge.
The UK public sector is battling through some of the most challenging times in its history. It has weathered several years of deep austerity measures, and local authorities in particular are facing a further round of budget reductions in 2015-2016.

Public Sector Channel Shift Strategies 2015 is the largest annual survey to examine the Channel Shift activities of UK public sector organisations. Devised and conducted by GOSS Interactive, it reveals how organisations are approaching Channel Shift, how they are overcoming the barriers to achieving it, and the benefits they expect to gain. It highlights some significant changes since the first survey was conducted just over 12 months ago, and explores organisations’ key Channel Shift focus areas for 2015.

### 2015 Channel Shift savings for each public sector organisation

<table>
<thead>
<tr>
<th>Central Government</th>
<th>Local Government</th>
</tr>
</thead>
<tbody>
<tr>
<td>£4.6m</td>
<td>£1.55m</td>
</tr>
<tr>
<td>Housing Associations</td>
<td>NGPB*</td>
</tr>
<tr>
<td>£900k</td>
<td>£550k</td>
</tr>
</tbody>
</table>

* NGPB = Non-Departmental Public Body

Channel Shift Survey shows Public Sector could save over £5B in 2015!

“We’re making digital public services as easy and convenient as online banking or booking a ticket online. Digital by default is becoming reality right across government.”

– Mike Bracken, Executive Director of Digital, UK Cabinet Office, October 2014

“The potential benefits for local government of greater use of technology and digital information are enormously persuasive. They have the potential to reduce costs, increase efficiency and deliver better outcomes. They can also stimulate innovation, enable new ways of working, and help to re-shape relationships between citizens, communities and local government.”

– Francis Maude, Conservative Member of Parliament

“Digitising public services is all part of our long-term economic plan to save hard-working taxpayers’ money and to give people peace of mind through high-quality public services which they can use when and where it suits them.”

– John Thornton, Chair, Digital Government Security Forum

“We must see digital government as a way of empowering people – service users and public sector employees, citizens and consumers – and enabling cost reduction in the process. We need to drive the power of digital out to the GP’s waiting room, the housing office, the school.”

– Chi Onwurah, Labour Member of Parliament

---

### Survey highlights

#### What has changed since last the survey?

This year’s survey shows there have been significant changes in the adoption of Channel Shift strategies, since our last survey, and in the expectations that organisations have of those strategies in 2015.

Alongside these changes, a new strategic focus is in evidence, as organisations look for new ways to meet the next round of budget cuts while maintaining frontline service delivery and quality.

Four key highlights from this year’s survey are as follows:

1. **Channel Shift adoption is gathering pace**

   58% of respondents say a Channel Shift strategy is in place up from 39% in the last survey.

   This shows that public sector organisations have made clear progress in turning the challenge around ‘Digital by Default’ into a strategic imperative for reduced costs and delivering better customer engagement.

2. **Cost savings expectations have risen significantly**

   This year’s survey reveals that the average expected cost saving is £1.75m for 2015. This is up from £685k in the last survey. This huge leap in expectations represents a 250% increase.

   The growing focus is on process efficiencies and mobile optimisation demonstrates that organisations are now beginning to rethink and redesign their operations to realise greater cost savings and truly deliver a greater customer experience.

3. **Business Process Mapping is gaining traction**

   In this year’s survey, 89% of respondents say that they are either already engaged in, or planning to engage in Business Process Mapping. In fact, after fully integrating front-end to back-end systems, Business Process Mapping was seen as the second highest driver to accelerating Channel Shift in 2015.

   This change reflects an acknowledgement that cuts to services and headcount will not be enough to handle the additional budget reductions for 2015-2016. It’s now clear that efficiency gains from radically re-engineering operational processes will be the most effective way to meet this challenge. It’s also the only effective way to address the rapid rise in mobile access.

4. **Mobile is a key focus channel for 2015**

   42% of survey respondents stated that mobile channels are seen as the biggest source of cost savings, up from 32% in the last survey.

   While not all services will be appropriate for mobile delivery, mobile transactions will continue to grow through 2015 and beyond. We have seen a steady rise in mobile access to public sector websites from 25% three years ago to an average 46% in 2014, and we expect mobile will exceed 50% of public sector website access during 2015.
About this survey

What is Channel Shift?

‘Digital by Default’ is a cornerstone of the UK Government’s strategy for service delivery and the term has now spread beyond central and local government into many other areas of the public sector. However, the term ‘Channel Shift’, while encompassing the principles of Digital by Default, takes a broader view of service delivery to also understand how other traditional channels can be enhanced to deliver better services.

Channel Shift is a strategy for moving as many customer interactions as possible to lower-cost channels while simultaneously improving service standards and user experience. Most often these will be digital channels, but Channel Shift also acknowledges that some customers can’t or won’t access services in this way. Shifting interactions with these customers from paper letters and face-to-face meetings to phone conversations can reduce costs significantly while improving service quality.

A Channel Shift strategy means more than just creating digital versions of existing processes. The goal is to redesign processes from the ground up to remove inefficiencies, rather than simply replicating these inefficiencies in digital form. To maximise the benefits from Channel Shift, organisations need to radically rethink every aspect of their operations for a digital, mobile and social age.

Profile of respondents

A total of 442 individuals from 362 public sector organisations responded to the survey. Of these individuals, 225 hold senior-level positions, 196 are in middle management and 20 are in non-management roles.

Respondents identified themselves as Chief Executive (13%), Director (15%), Head of Department (23%), Manager (44%) and Other (5%). Roles in the ‘Other’ category span a range of portfolios, including Marketing, Customer Services, and ICT.

Profile of organisations

The survey respondents are from organisations across the UK public sector, including: Local Authorities (111 respondents), Charities (68), Housing Associations (67), NHS/Healthcare (52), Education (46), Non-Departmental Public Bodies (46) and Central Government (27) including House of Commons, Department of Work & Pensions, DVLA, Defra and Local Government Association.

These organisations vary in size, including those with more than 10,000 employees (35 respondents), 2,500-10,000 employees (103), 500-2,499 employees (108), 250-499 employees (69), 50-249 employees (83) and fewer than 50 employees (44).

Survey results

This survey offers a unique insight into how public sector organisations are approaching Channel Shift, the challenges they face, and the benefits they expect to receive. The following sections look at the key findings across the sector as a whole and examine the results from individual sub-sectors in more detail.

1. Channel Shift adoption is growing fast

The combined pressures of deep budget cuts and the move to ‘Digital by Default’ have led to a sharp increase in Channel Shift strategy adoption across the public sector. This year, 58% of respondents say an organisation-wide Channel Shift strategy is in place, up from only 39% in the last survey, an increase of 50%.

Has your organisation adopted a Channel Shift strategy?

In the 2013 survey, 26% of those with no Channel Shift strategy in place said they had no plans to review their policy. However, that proportion has now halved, with just 13% saying they have no plans to review and three-quarters (76%) saying they plan to review their stance on Channel Shift within the next 12 months, compared to just under two-thirds (64%) in the last survey.

If No, When does your organisation plan to review your Channel Shift Strategy?

Another sign of a growing confidence in Channel Shift is the increase in the proportion of services that organisations plan to shift online. In the last survey, 54% of organisations were planning to move 11-49% of services online over the following 12 months. This 2015 survey reveals that 53% of respondents say their organisation plans to move 25-74% of service online during 2015.
2. Expectations of cost savings have risen significantly

With further cuts looming, Channel Shift has a vital role to play in efficiency savings and cost reductions. 79% of respondents felt Channel Shift would help their organisation to achieve efficiency savings, up from 66% in the last survey, showing an increased recognition of the positive impact of Channel Shift strategies.

The most dramatic increase, however, has been in respondents’ expectations of how much Channel Shift will help them save over the next year. This year the average expected cost saving is £1.75m, up from £695,000 in the last survey; a huge increase of more than £1m per organisation.

3. Mobile is the key focus channel for 2015

While cost reduction (89%) and better access to services (78%) are still the top drivers for adopting a Channel Shift strategy, there has been a marked increase in the importance organisations place on improving customer engagement, which has jumped from 48% in the last survey to 67% in 2015.

The convergence of these key drivers is behind an increased emphasis on mobile service delivery, which can improve access and engagement for today’s connected customers while offering significant opportunities for cost savings.

When asked which channels could deliver the most savings, respondents last time selected mobile web (32%), desktop web (22%) and social media (19%). For 2015, the top cost-saving channels remain the same (mobile web 42%, desktop web 22% and social media 12%), but there has been a big rise in mobile, up to 42% of responses; a 31% increase on the last survey.

The big shift towards mobile is also clear from the level of mobile optimisation at the respondents’ organisations. Respondents saying their organisation had no plans to implement mobile services has fallen by 72% from 18% in the last survey to 5% in this year’s survey.
4. Barriers to successful Channel Shift strategies remain the same

In terms of the barriers organisations face as they move towards a successful Channel Shift strategy, there has been little movement since the last survey. Systems integration (21%), lack of budget (19%) and staff culture (16%) were the key issues in the last survey and they remain the key barriers for 2015 (systems integration 20%, lack of budget 20% and staff culture 17%).

Overcoming these hurdles should be a key focus for public sector organisations in 2015 as they look to drive the adoption of online self-service to improve service delivery and quality while reducing costs and increasing engagement.

Lack of budget, for example, should not be seen as a barrier to Channel Shift. The Socitm website performance data shows that a lot of money is wasted because existing online services are not fit for purpose. By ensuring online services are optimised, especially for mobile, organisations can free up resources to fund strategic Channel Shift programmes that save even more money. Online transactions typically cost around £0.83 for telephone or £3.62 for face-to-face meetings. If online services are delivered effectively, Channel Shift initiatives should quickly pay for themselves many times over.

5. Business Process Mapping is the key to effective Channel Shift strategies

Channel Shift is about more than simply moving services to digital channels. The organisations that achieve the most success from Channel Shift take a detailed look at all their processes and redesign them for the digital age. This could explain why support for Business Process Mapping (BPM) has grown significantly since the last survey.

89% of respondents said they were undertaking BPM initiatives, with more than half (54%) currently engaged in BPM activities and a quarter (25%) planning to begin BPM projects in 2015. In the last survey, one-fifth (20%) of respondents said their organisation had no plans to undertake BPM initiatives. In this year’s survey however, only 11% of respondents say they have no plans to start BPM projects.

The increased adoption of BPM may be due to the fact that public sector organisations have exhausted the traditional routes to cost savings (such as cutting services or reducing headcount) and now need to automate and streamline processes wherever possible to meet further rounds of budget cuts.

Unfortunately, many public sector organisations report that BPM activities are hampered by a lack of training and knowledge (21%) and limited access to BPM tools (16%).

Given the barriers outlined above, it’s unsurprising that, when asked what could help their organisations accelerate Channel Shift, 68% of respondents cited fully integrated systems. There is also a strong emphasis on better online forms (48%) and mapping and improving process (52%).

When asked how they could make forms better for their customers, nearly half (48%) of responses were focused on mobile optimisation (24%) and integration with back office systems (also 24%), demonstrating a clear correlation with the increased focus on mobile already outlined, as well as the need for integrated systems to make channel-shifted processes easier and more intuitive.

However, as the following section explores, mapping and improving processes is one of the major focus areas for 2015.
6. Improved marketing is needed to demonstrate and promote Channel Shift success

The marketing of Channel Shift initiatives has been underinvested and it is clear from responses to the survey that this is a key area for improvement in 2015. A third (32%) of respondents stated that they needed marketing kits to help them promote Channel Shift internally and externally.

Identifying the best ways to communicate the benefits of Channel Shift is critical for success. Internally, organisations must often battle a staff culture that looks at Channel Shift unfavourably. Externally, public sector organisations must educate citizens on the benefits (and indeed, the necessity, due to severe budget cuts) of conducting more transactions online. However, successful marketing can only be undertaken once online services are fully tested and optimised for mobile access.

What would help you to demonstrate/promote Channel Shift success?

- Internal dashboard showing all service requests
- Customer facing dashboard showing service volumes by channel
- A marketing kit to promote Channel Shift internally
- Customer facing dashboard showing service savings by channel
- A marketing kit to promote Channel Shift externally
- Benchmarking against other similar organisations
- Developing dashboards with other similar organisations

The following pages examine the responses to the survey from individual sectors: Local Government, Housing Associations, NHS/Healthcare, Education, Non-Departmental Public Bodies and Central Government.

Local Government – summary of key findings

A more strategic approach is emerging

Respondents to this year's survey included 111 individuals from 94 local government organisations, providing a detailed insight into the current state of Channel Shift in local authorities as well as their plans for the future.

In many local government bodies, customer services teams take the lead on Channel Shift initiatives (36%). Although this may appear to show a more tactical rather than strategic approach to Channel Shift, it is possible that, due to the wide variety of customer-facing services provided by local authorities, senior customer services executives will have a more strategic role.

However, in the last survey, 44% of local government respondents said customer services departments were leading Channel Shift activities. This year, as Channel Shift becomes more of a strategic concern for local government organisations, more than a quarter (27%) of respondents say it is being led from the top, either by the Chief Executive's office (10%) or through a dedicated transformation team (17%).

 Adoption

Since the last survey there has been a significant rise in the number of local authorities treating Channel Shift as an organisation-wide strategic initiative. This year 74% of respondents reported that their organisation had adopted a Channel Shift strategy, up from 56% in the last survey.

Has your organisation adopted a Channel Shift strategy?

- Yes 26%
- No 74%
For many local government organisations, Channel Shift is still in its infancy, but expected to grow up significantly in 2015. Overall, 39% of respondents said Channel Shift is still in the early stages of adoption, with a further 39% saying it has been achieved in less than 25% of services, 16% saying it has been achieved in less than 50% of services, and just 5% saying Channel Shift has been rolled out to more than 50% of services.

How far progressed is your Channel Shift programme?

- Early stages of adoption (16%)
- Achieved in less than 25% of services (39%)
- Achieved in less than 50% of services (39%)
- Achieved in over 50% of services (1%)
- Fully achieved organisation wide (1%)

For those organisations that have implemented Channel Shift organisation-wide, two-thirds (66%) plan to review their strategy within the next six months and a further 19% have a review planned for later in 2015.

If No, When does your organisation plan to review your Channel Shift Strategy?

- Within three months (14%)
- Three to six months (14%)
- Six to twelve months (38%)
- Twelve to eighteen months (14%)
- No plans to review (14%)

Encouragingly, all the respondents that said their organisation has no clear Channel Shift strategy say they have plans in place to review their approach. Overall, 86% of these organisations plan to review their stance on Channel Shift before the end of 2015, with 34% planning to review within three months, 38% planning to review in three to six months, and a further 14% planning to review between six and twelve months.

For this year’s survey, 58% of respondents said they planned to Channel Shift between 11% and 49% of services. Response to this year’s survey, however, show that 58% of respondents plan to Channel Shift between 25% and 74% of services during 2015.

If Yes, When does your organisation plan to review your Channel Shift Strategy?

- Within three months (44%)
- Three to six months (12%)
- Six to twelve months (10%)
- Twelve to eighteen months (3%)
- No plans to review (22%)

What percentage of services are you planning to Channel Shift over the next 12 months?

- 0-5% (29%)
- 6-10% (21%)
- 11-24% (29%)
- 25-49% (9%)
- 50-74% (6%)
- 75-99% (3%)
- 100% (3%)
Cost savings

The majority (59%) of local government respondents believe Channel Shift will help their organisation achieve efficiency savings.

Do you feel Channel Shift will help your organisation to achieve efficiency savings?

![Pie chart showing 59% Yes, 6% No, and 35% Don't Know]

Expectations of the cost savings that can be realised through Channel Shift have risen sharply. This year’s survey shows that the average savings expected by local authorities in 2015 is a massive £1,559,211. In the last survey, the average savings expected were £450,000. This difference is a huge increase in predicted benefits in just 12 months.

How much can you save in the next 12 months by channel shifting citizen interactions online?

![Pie chart with categories: £0-£250k, £250k-£500k, £0.5m-£1m, £1m-£3m, £3m-£5m, £5m-£10m, £10m+]

Mobile

Channel Shift plays a key role in helping local authorities reduce costs, with 95% of respondents saying cost reduction is one of the benefits of moving transactions online. At 48%, there is less focus on customer engagement than in the overall public sector, with better access (76%) and handling increased transaction numbers (70%) seen as more important benefits.

Mobile channels are a clear focus area for local government in 2015. 43% of responses cited mobile web as the biggest driver of cost savings, in line with the overall public sector result of 42%. This shows a big increase on the last survey, when mobile channels garnered 32% of responses to the same question.

What are the benefits of moving transactions online?

![Bar chart showing percentages: 95% Cost reduction, 26% Better access, 48% Customer engagement, 20% Increase in transactions, 38% Revenue]

Which channels do you think can deliver most savings?

![Pie chart with categories: Mobile website 1%, Desktop website 5%, Social Media 8%, LiveChat 9%, Telephone 10%, Face to face 34%, Other 24%]

Mobile channels are a clear focus area for local government in 2015. 43% of responses cited mobile web as the biggest driver of cost savings, in line with the overall public sector result of 42%. This shows a big increase on the last survey, when mobile channels garnered 32% of responses to the same question.
Over the last 12 months, more work has been done to take advantage of the opportunity that mobile offers to reduce costs. In the last survey, only 56% of respondents said that their organisation had any services optimised for mobile, with 40% saying limited services were optimised, 16% saying most services were optimised and 6% saying all services were optimised.

This year, 73% of respondents say they have some form of mobile optimisation; 45% say limited services are optimised, a further 22% have most services optimised and 6% have optimised all services for mobile. The remaining 27% all plan to implement mobile services during 2015, showing a clear move towards mobile as a key cost-saving channel.

Demonstrating and promoting Channel Shift success

As we have seen, staff culture is a major obstacle for Channel Shift in many local government organisations, where gaining employee buy-in to the major process changes necessary to meet severe budget cuts can be a significant challenge. When asked what would help them promote Channel Shift, the need for marketing kits (31%) was high. However, internal marketing kits achieved nearly twice as many responses as customer-facing marketing kits (20% compared to 11%).

Local authorities are also aware of the need to demonstrate the success of Channel Shift to customers, with customer-facing dashboards gaining 42% of responses altogether.

What would help you to demonstrate/promote Channel Shift success?

- Customer facing dashboard showing service volumes by channel
- Customer facing dashboard showing service savings by channel
- Internal dashboard showing all service requests
- Developing dashboards with other similar organisations
- A marketing kit to promote Channel Shift (culture change) internally
- A marketing kit to promote Channel Shift (customer self-service) externally

Barriers to successful Channel Shift strategies

Despite increased adoption of Channel Shift strategies and a growing recognition of their value to local government organisations, respondents still face a number of barriers to the rollout of Channel Shift. These include staff culture (22%), systems integration (21%), technology (17%), lack of budget (17%), and lack of skills (15%).

Systems integration remains a key challenge for local government organisations, many of which have processes running on multiple, disjointed systems that are difficult to put online. However, there have been two interconnected developments since the last survey, as Channel Shift adoption has gathered pace within the sector.

The challenge of a lack of senior management buy-in has fallen from 15% to just 6% in this year’s survey, showing that top-level executives now understand the potential of Channel Shift. On the ground, however, that enthusiasm is not always shared. At 22%, staff culture is now perceived as the largest barrier to Channel Shift success, up from just 4% last year.

It may be that, as senior managers drive Channel Shift initiatives, the benefits of these strategies are not being communicated to staff effectively, resulting in greater resistance to the significant changes that Channel Shift can entail.
Improving forms

Local government respondents cite better online forms as the main improvement that would help accelerate Channel Shift.

This is perhaps not surprising given the sheer number of services local authorities have to provide. The quality and ease of use of forms is critical for organisations to convince customers to shift their transactions to online channels. The spread across integration, process mapping, forms, ‘MyAccount’ and dashboards, shows the need for organisations to provide a holistic self-service approach to channel shift. What is required is an integrated approach where form submissions are automatically entered into an end-to-end automated process workflow and citizens are kept informed throughout the process.

When asked how forms could be improved for customers, the four top responses were mobile optimisation (26%), integration with back office systems (24%), better designed forms that are easier to complete (21%), and moving from paper and PDF forms to web forms (17%).

Business Process Mapping

Spurred by the need to make radical changes to processes to realise additional savings without jeopardising frontline services, the vast majority of local authorities are turning to Business Process Mapping (BPM) to help them redesign processes for a digital era.

This survey reveals a marked increase in Business Process Mapping (BPM) since last year. Nearly all (94%) local government respondents say their organisation has either completed a Business Process Mapping (BPM) exercise (16%), are currently undertaking BPM (53%), or plans to undertake one in 2015 (25%).

Although there is a clear enthusiasm for BPM, organisations still face a number of challenges to implementing it effectively. When asked what would help accelerate BPM initiatives, responses included training and knowledge (23%), shared projects with similar organisations (17%), a dedicated BPM specialist or team (16%), and access to BPM tools (16%).
Central Government – summary of key findings

Adoption

With central government driving the move to Channel Shift with its ‘Digital by Default’ agenda, it’s no surprise to see that a majority (60%) of respondents say their organisation has an organisation-wide Channel Shift strategy in place. In fact, with ‘Digital by Default’ a key pillar of the UK Government’s digital strategy, it is surprising that 40% of respondents say their organisation has no clear Channel Shift strategy.

Has your organisation adopted a Channel Shift strategy?

However, by the end of 2015 these figures should look very different. All of the respondents currently without a clear Channel Shift strategy say their organisation plans to review its approach at some point in the next 18 months. More than half (53%) say they plan to review Channel Shift within three months, a further 17% plan to review in 3-6 months, 18% in 6-12 months, and 12% in 12-18 months.

If No, When does your organisation plan to review your Channel Shift Strategy?

Cost savings

There is a clear recognition of the potential for Channel Shift to drive cost reductions, with 88% of central government respondents saying they expect to see efficiency savings as a result of their Channel Shift programmes.

Operating on a national scale, and often with larger overall budgets than more localised public sector organisations, central government bodies expect to achieve much higher cost savings than the average for the sector. The average expected 12-month savings from Channel Shift are £4.6 million for central government organisations, compared to £1.75 million across all public sector bodies. Half of central government respondents expect to save more than £5 million during 2015, with 40% anticipating £5-10 million of savings and 10% expecting to realise more than £10 million in cost reductions.

How much can you save in the next 12 months by channel shifting citizen interactions online?

Mobile

With more than half of UK adults now owning a smartphone, mobile channels should be a key priority for service delivery in 2015. The survey reveals that 46% of central government respondents believe mobile channels offer the greatest potential for cost savings, although the emphasis on web channels (46% mobile web and 35% desktop web) could be due to the limited number of face-to-face interactions that central government bodies have with their customers.

Although none of the central government organisations in the survey have optimised all services for mobile, the majority (82%) have mobile initiatives, with either most services optimised (18%), limited services optimised (18%), or have plans to implement mobile services in 2015 (46%).

How optimised are your Mobile website services to support your Channel Shift objectives?
Business Process Mapping

Although none of the central government respondents say their organisation has completed a Business Process Mapping (BPM) exercise, nearly all (92%) are either currently undertaking BPM activities (59%) or plan to do so during 2015 (33%). This focus on BPM is reflected elsewhere in the survey. When asked what would help them accelerate their Channel Shift efforts, 81% of central government respondents selected mapping and improving processes.

Are you currently undertaking Business Process Mapping (BPM) to improve how your services are delivered?

- Yes - already completed: 59%
- Yes - in progress: 33%
- Yes, planning to undertake in the next 12 months: 8%
- No plans to do so: 8%

A lack of training and knowledge is a key challenge for successfully completing BPM initiatives. When asked what would help them accelerate BPM, a third (33%) of respondents cited training and knowledge as an important requirement. Other key factors identified by respondents include a BPM specialist or team (17%), shared projects with similar organisations (17%), a community with pre-built process maps (10%), and access to BPM tools (10%).

What would help you to accelerate Business Process Mapping (BPM)?

- Training and knowledge: 33%
- A dedicated BPM specialist/team: 17%
- Shared projects with other similar organisations: 17%
- Access to BPM tools: 17%
- Community with pre-built process maps: 11%
- BPM integrated with our service delivery tools: 11%
- Hands on BPM events: 5%
- Access to BPM consultancy: 6%

Housing Associations – summary of key findings

Adoption

Housing associations are in line with the general public sector trend of increasing adoption of organisation-wide Channel Shift strategies. This year the majority (55%) of respondents say their organisation has a Channel Shift strategy in place. In the last survey, only 38% reported that their organisation had adopted a clear Channel Shift strategy.

Has your organisation adopted a Channel Shift strategy?

- Yes: 55%
- No: 45%

Of the remaining 45% who have not adopted a Channel Shift strategy, almost three-quarters (71%) plan to review their strategy before the end of 2015, with a further 25% planning a review after 12-18 months. Only 4% have no plans to review their Channel Shift strategy, a significant fall from the last survey, when 13% of those with no clear Channel Shift strategy also had no plans to review it.

If No, When does your organisation plan to review your Channel Shift Strategy?

- Within three months: 33%
- Three to six months: 17%
- Six to twelve months: 17%
- Twelve to eighteen months: 21%
- No plans to review: 5%
Cost savings

The scale of potential cost savings varies with the size of individual housing associations. However, 91% of respondents believe that Channel Shift will help them achieve at least some level of efficiency savings, a slight increase on last year (88%).

As in much of the public sector, as the benefits of Channel Shift become clear and organisations take a more strategic, holistic approach to shifting customer interactions on to lower-cost channels, expectations of cost savings have risen dramatically. This year's survey shows that for 2015 the average expected saving from Channel Shift for Housing Associations is £986,842. In the last survey the average saving expected during 2014 was £575,000 – a huge 71% increase.

How much can you save in the next 12 months by channel shifting citizen interactions online?

![Graph showing cost savings by channel shifting]

Mobile

The rise of affordable smartphone technology has seen the web become more accessible than ever, especially for people in lower-income demographics. This could explain why respondents believe mobile channels can deliver the most savings. Nearly half (46%) of respondents see mobile as the biggest cost-saving channel, up from 35% last year.

This increased focus on mobile is highlighted by the fact that all respondents from housing associations say their organisation has some services optimised for mobile or is planning to implement mobile services during 2015. This year, 13% have all services optimised, 22% have most services optimised, 30% have some services optimised and 35% plan to rollout mobile services in the next year, compared to the last survey when 13% said their organisation had no plans to implement mobile optimised services.

Business Process Mapping

Business Process Mapping (BPM) is still in the early stages of adoption in housing associations, but during 2015 that picture should change considerably. This survey reveals the vast majority (83%) of housing associations have either already completed a BPM project (12%), are currently undertaking BPM activities (46%), or plan to commence BPM during 2015 (25%).

Are you currently undertaking Business Process Mapping (BPM) to improve how your services are delivered?

![Graph showing BPM status]

However, there are still challenges to overcome to deliver successful BPM projects. When asked what would help them accelerate BPM, respondents cited a number of key requirements, including access to BPM tools (21%), training and knowledge (17%), shared projects with similar organisations (16%), a community with pre-built process maps (12%), and hands-on BPM events (12%).

What would help you to accelerate Business Process Mapping (BPM)?

![Graph showing BPM acceleration needs]
Adoption

While the majority of NHS respondents are leading or participating in Channel Shift projects, only a third (33%) report that their organisation is treating it as a strategic initiative. Although this goes against the overall trend across the public sector, it is an encouraging increase on last year’s findings, when just 24% of NHS respondents said their organisation had adopted a clear Channel Shift strategy.

Are you personally responsible or involved in Channel Shift projects?

Approaches to Channel Shift in the NHS will naturally differ to those found elsewhere in the public sector, due to the nature of the services being delivered and the way that NHS bodies are organised.

This difference is highlighted by the finding that, while customer services teams lead Channel Shift activities at 24% of public sector organisations, this figure is only 4% for the NHS organisations in the survey. A quarter (26%) of NHS respondents say Channel Shift is led by the Chief Executive’s office, compared to 16% in the public sector overall.

Barriers and benefits

Adoption of Channel Shift strategies in the NHS is being hampered by a number of key challenges. Lack of budget remains the top challenge, with 20% of responses in this year’s survey, around the same level as in the last survey – 21%.

However, a lack of senior management buy-in is seen as less of a barrier, down from 18% in the last survey to 9% in this year’s survey. This could reflect a growing awareness among senior NHS managers of the financial benefits of Channel Shift.

Which of the following challenges/barriers do you face in Channel Shift?

Although cost savings are widely acknowledged as a key benefit of Channel Shift strategies, the nature of NHS organisations’ interactions with their customers shows some interesting differences in priority channels for 2015 compared to the rest of the public sector.

While 42% of public sector respondents cite mobile as the biggest driver of cost savings, only 23% of NHS respondents agree. In contrast to the rest of the public sector, almost a third (31%) of respondents from NHS organisations selected social media as the channel with the biggest potential for cost savings, against an average of 12% for the sector as a whole.

Which channels do you think can deliver most savings?
Education – summary of key findings

Adoption

Although the majority of respondents in the education sector are either leading or involved in Channel Shift activities, 54% have yet to adopt an organisation-wide strategic approach to moving services to lower-cost channels. During 2015, however, a much higher proportion of educational institutions should start to put Channel Shift strategies in place.

Has your organisation adopted a Channel Shift strategy?

Of those with no strategy currently in place, 78% plan to review their position before the end of 2015, with 22% planning a review within three months, 45% planning to review their approach in 3-6 months, and a further 11% planning a Channel Shift review in 6-12 months.

If No, When does your organisation plan to review your Channel Shift Strategy?

Cost savings

Education respondents are less clear about the efficiency benefits of Channel Shift than many of their counterparts in other public sector bodies. Only 60% of respondents feel that Channel Shift will help them realise efficiency savings, with 36% unsure of the potential cost reduction benefits.

Do you feel Channel Shift will help your organisation to achieve efficiency savings?

When asked which channels could deliver the most savings, education respondents demonstrated a clear focus on mobile channels, with 51% of responses. Desktop web (15%) and social media (16%) accounted for another 31%.

Which channels do you think can deliver most savings?
Business Process Mapping

None of the education organisations in the survey has completed a Business Process Mapping (BPM) project. However, nearly all (90%) the respondents said their organisation is either currently engaged in BPM activities (60%) or has a BPM programme planned for 2015 (30%).

In common with the rest of the public sector, educational institutions are challenged to provide the requisite levels of training and knowledge to accelerate BPM projects. When asked what they needed to enable successful BPM initiatives, responses included training and knowledge (25%), access to BPM tools (21%), shared projects with similar organisations (12%), and a community with pre-built process maps (12%).

Are you currently undertaking Business Process Mapping (BPM) to improve how your services are delivered?

- Yes - already completed
- Yes - in progress
- Yes, planning to undertake in the next 12 months
- No plans to do so

Mobile

With a significant emphasis on mobile channels as the biggest source of potential cost savings, respondents show an advanced level of mobile maturity within the education sector. This may be due to the increased smartphone usage of the younger demographic that makes up the majority of customers at educational institutions.

Three-quarters (75%) of respondents say their organisation has some services optimised for mobile. While the majority (58%) have limited services optimised, an impressive 17% have already optimised all services for mobile channels, more than double the overall average for the public sector of 8%.

How optimised are your Mobile website services to support your Channel Shift objectives?

- All services are optimised
- Most services are optimised
- Limited services optimised
- We plan to implement in the next 12 months
- No plans to implement

What would help you to accelerate Business Process Mapping (BPM)?

- Training and knowledge
- Access to free BPM tools
- Shared projects with other similar organisations
- Community with pre-built process maps
- A dedicated BPM specialist/team
- BPM integrated with our service delivery tools
- Access to BPM consultancy
- Hands-on BPM events
Non-Departmental Public Bodies – summary of key findings

Non-departmental public bodies are organisations that carry out work at arm’s length from ministers, although ministers are responsible to Parliament for their activities. Examples of Non-Departmental Public Bodies include: BBC, Civil Aviation Authority, English Heritage, Technology Strategy Board, Ofwat and The Arts Council.

Adoption

Non-departmental public bodies are currently lagging behind their counterparts elsewhere in the public sector in terms of Channel Shift strategy adoption, but that’s about to change.

Two-fifths (41%) of respondents to the survey say their organisation has already adopted a clear Channel Shift Strategy, compared to 58% in the public sector as a whole.

Cost savings

Although Channel Shift adoption among non-departmental public bodies is lower than the rest of the public sector, there is a clear recognition of the savings that Channel Shift can help organisations achieve. Fully 82% of respondents believe Channel Shift will lead to efficiency savings, with the remaining 18% uncertain of the financial benefits available.

Has your organisation adopted a Channel Shift strategy?

![Pie chart showing adoption rates]

When asked which channels could deliver the biggest savings, website-based channels garnered more than half (51%) of the responses, with mobile web at 31% and desktop web at 21%. Non-departmental public bodies also place a greater emphasis on LiveChat (14%) than the public sector as a whole (10%).

If No, When does your organisation plan to review your Channel Shift Strategy?

![Pie chart showing review plans]

However, of the 59% of respondents with no organisation-wide Channel Shift strategy in place, three-quarters (75%) plan to review their approach during 2015 and a further 17% plan a Channel Shift review after 12-18 months. Only 8% of those with no Channel Shift strategy have no plans to review their position.
Business Process Mapping

Although only 7% of respondents say their organisation has completed a Business Process Mapping (BPM) exercise, there are very encouraging signs that work is under way to increase that figure dramatically. A huge 72% of respondents say that BPM activities are currently underway in their organisation, with a further 7% planning to begin BPM initiatives in 2015.

Are you currently undertaking Business Process Mapping (BPM) to improve how your services are delivered?

- 14% Yes - already completed
- 7% Yes - in progress
- 73% Yes, planning to undertake in the next 12 months
- 7% No plans to do so

With so many organisations currently engaged in BPM activities, the challenge of accelerating BPM may well be front of mind for many respondents. When asked what they need to help accelerate BPM, respondents selected a number of requirements, including training and knowledge (24%), access to BPM tools (19%), a community with pre-built process maps (14%), shared projects with similar organisations (10%), and hands-on BPM events (10%).

What would help you to accelerate Business Process Mapping (BPM)?

- Training and knowledge
- Access to free BPM tools
- Community with pre-built process maps
- A dedicated BPM specialist/team
- BPM integrated with our service delivery tools
- Shared projects with other similar organisations
- Hands on BPM events
- Access to BPM consultancy

Mobile

Although mobile channels are seen as the biggest source of cost savings by 31% of respondents, this is significantly lower than the results in the public sector as a whole, where 42% believe mobile to offer the biggest opportunities for savings.

This is reflected in the fact that only 31% of respondents from non-department public bodies say their organisation has some or all services optimised for mobile, less than half of the 67% found in the overall public sector.

Encouragingly, however, the overwhelming majority (61%) of respondents say their organisation is planning some form of mobile implementation for 2015, with only 8% saying they have no plans to optimise services for mobile channels.

How optimised are your Mobile website services to support your Channel Shift objectives?

- 61% All services are optimised
- 15% Most services are optimised
- 8% Limited services optimised
- 8% We plan to implement in the next 12 months
- 8% No plans to implement
Conclusions

This is the second GOSS Interactive survey into Channel Shift strategies in the public sector, and thus is ideally placed to reveal how attitudes and approaches have changed over the past years.

As we’ve noted throughout this report, the scale of change in the space of just over twelve months is surprising and dramatic, revealing a sudden groundswell of energy and enthusiasm for Channel Shift. Public sector organisations seem to be pinning their hopes on Channel Shift as a way – perhaps the only way – to combat the effects of austerity budgets, and to improve service delivery in the face of severe budget cuts and constraints.

Channel Shift’s rapid elevation from tactical measure to strategic priority is a clear indicator of this, but by no means the only one. There has also been a major increase (over 250%) in the size of cost savings that public sector organisations expect to be able to make from Channel Shift – from £685k in the last survey to £1.75m in 2015.

This suggests that, now that senior management are demonstrably on board with it, there’s executive sponsorship to make the most of the Channel Shift opportunity – as long as organisations can allocate the budget and convince their staff to get behind it, too.

There’s ample evidence that Channel Shift thinking has rapidly become more sophisticated too. Channel Shift is much more than taking existing processes and moving them online. The best results come when those processes are deconstructed, analysed and rebuilt for the digital age, taking modern customers’ needs, habits and digital devices into account.

This year’s survey shows that most public sector organisations recognise this, with 89% either undergoing or planning to undergo a business process mapping exercise to ensure their online processes are fit for purpose.

There is perhaps a realisation that if digital processes aren’t fit for purpose, any Channel Shift initiative will be self-defeating – as customers will attempt the online process, fail to achieve what they wanted to do, revert to a call or face-to-face visit, and possibly never visit the website again.

Certainly, Socitm’s Website Performance Service observed a huge volume of failed online transactions in 2014 – amounting to some twelve million per month across all 433 local authorities – so the cost advantage of getting processes right is clear. And with mobile traffic to public sector websites now approaching 50% of all visits, online processes need to be re-designed to cater to smaller screens, swipes and taps as well as PCs, keyboards and mouse clicks.

“Adapting to digital presents opportunities way beyond mere ICT-enablement of existing ways of working. Adapting to digital is about taking the opportunity to open up and redesign services to achieve different and better outcomes in ways that were previously unimaginable.”

– Socitm, Policy Briefing, October 2014

Recommendations

With this year’s survey findings in mind, we offer six recommendations to help you maximise the speed, value and return on investment of your Channel Shift initiatives.

1. Focus on customer engagement

This year’s survey shows that public sector organisations no longer see Channel Shift purely as a cost-cutting opportunity, but also as a means to improve customer engagement.

For Channel Shift to be successful on both of those fronts, it has to put customers and their needs first. And that means understanding those customers and their needs in the first place. There are many ways to gain insight into how customers interact with your organisation; which processes they find useful and valuable; and which experiences send them running for the hills.

The best insights come when you combine multiple sources of information: combing through web analytics to understand sticking points in online processes; interviewing real-life customers to discover how, when and where they prefer to engage with your organisation; and looking at demographic data to understand what type of customers you are serving.

Once you’ve gathered that data, it’s extremely useful to create a set of customer personas: profiles of different ‘types’ of customer whose needs you should keep front of mind when designing new digital and mobile processes. A set of five or six personas is usually enough to provide a useful representative view of your customer communities and what they need from your organisation.

2. Re-engineer your processes for the digital age

One of the most encouraging findings to come out of this year’s survey is the effort organisations are now putting into re-engineering processes for digital delivery.

Almost 90% of the organisations surveyed had either completed or planned to complete a business process mapping exercise – a necessary first step to ensuring that online processes are as efficient, intuitive and quick to complete as possible.

With the entire sector focusing on designing fit-for-purpose digital processes, there’s a huge opportunity to share best practice and save other organisations from having to design new processes from scratch. There are many knowledge-sharing forums out there – including the GOSS Forms & Process Community – where you can find ready-made, best-practice process maps, tools and website plugins for everything from reporting a missed bin collection to renewing a library book.

So, before you dive in and re-design all of your processes, check someone else hasn’t already done the work for you. It could save weeks of effort and start delivering Channel Shift savings even faster.
3. Design all your services for mobile

Technology moves much faster than many in the public sector would like – but with that breakneck speed of evolution comes a huge opportunity. The past few years have seen a surge in the number of people using mobile devices to access and interact with public services, from snapping a photo of a pothole and reporting it online, to searching for local amenities when out and about.

In 2015 we will almost certainly see mobile traffic to public sector websites tip over the 50% mark – the point at which it becomes imperative to design digital processes, forms and services for ‘mobile first’. This year’s findings show that the public sector increasingly recognises this is the case, with 42% saying that mobile presents the biggest opportunity for cost savings.

In 2015, organisations must ensure they’re doing more than pay lip service to the mobile revolution – they must truly design with mobile in mind. Failing to do so will almost certainly result in millions of failed transactions that risk undoing the very cost and efficiency benefits that Channel Shift is uniquely capable of delivering.

4. Engage your organisation and customer

Another heartening finding from this year’s survey is that a far greater proportion of senior management are now on board with Channel Shift, and are driving it as top-down strategy across the organisation. This is a necessary condition for organisations to derive the maximum possible value from Channel Shift.

That means devising marketing programmes to promote the benefits of Channel Shift externally and internally. Interestingly, one-third of respondents to this year’s survey said they needed marketing kits to promote Channel Shift to internal and external audiences. A greater focus on marketing Channel Shift in 2015 will be necessary to convince the ‘naysayers’ to embrace these new and ultimately beneficial ways of working and engaging.

5. Focus on digital inclusion

It’s vital to remember that any Channel Shift strategy needs to tackle digital inclusion and help customers without internet access or basic digital skills to benefit from online channels. Simply moving services online without considering digital inclusion is likely to restrict access to services for the people who need them most.

By providing training and internet access, digital buddy schemes and other assisted digital services, public sector organisations can not only move more interactions to lower-cost digital channels, they can also tackle wider social issues. Assisting previously excluded demographics to get online can provide citizens with the essential skills to reduce household bills, improve employability and reduce isolation.

The customer personas you create should include one that represents people who may currently be excluded from digital channels. The marketing of Channel Shift initiatives also needs to bear these customers in mind. Customers on lower incomes are more likely to access the internet on smartphones, so a mobile-first strategy can not only save significant sums of money, it can also help you engage customers who may otherwise be excluded.

6. Drive amazon-like self-service

Unstructured emails and web forms are rarely integrated properly to back-end systems for automated workflow and processing. This shows an extremely low level of digital self-service provision across the public sector and highlights that there are still big savings that can be made in this area. User experience is a key to up-take and cost reduction, which is enhanced by providing forms that work on mobile devices, are integrated with other systems and allow for seamless payment.

Integration was cited by 68% of survey respondents as the key barrier to channel shift. Integration is the key to delivering online self-service, to enhancing customer service and to lowering service delivery costs. However, integration should not just be addressed as a technical systems project, but instead it should be tackled by analysing the interactions with your online customers and looking at how the users journey can be enhanced by better/seamless integration with your back-end systems and payment processing providers to deliver a better overall customer experience.
Case studies

MENDIP DELIVERS USER-CENTRIC WEBSITE

Mendip District Council is preparing for the digital future with a new five-year web strategy that will move more enquiries and transactions online, significantly reducing its service delivery costs.

A new website and mobile site, built using technology and consultancy from the public sector web specialists at GOSS, is designed to keep pace with customers’ changing technology usage patterns as more people turn to the web first for local government information and services.

“GOSS was the only CMS vendor who also had a complete strategy for helping us to move more transactions online and make significant cost savings. We couldn’t have done this with anyone else.”
– Lucy Mitchard, ICT Officer (Web), Mendip District Council

STIRLING DELIVERS CHANNEL SHIFT SUCCESS

A surge in customer use of mobile devices and social media gave Stirling Council an opportunity to rethink its service delivery approach – moving more services online to reduce costs and meet evolving customer needs.

The customer service team identified GOSS as channel shift specialists and asked us to facilitate channel shift workshops for the entire management team. The workshops ensured buy-in across the Council and acted as the first step in creating a cross-authority channel shift action plan.

“The public sector experience of the GOSS consultants was essential, as local authorities are culturally very different from the private sector. I would fully recommend this workshops to other local authorities looking to develop a practical approach to Channel Shift.”
– Alan Whisker, Customer Service Development Manager, Stirling Council

IMPROVED SERVICE STRATEGY FOR MOAT

Moat is a major housing association working across the South East of England to provide high-quality, affordable homes and services. A key focus for Moat is making the most efficient use of its resources to ensure its customers’ needs are met in the most effective way.

With the help of GOSS, Moat has defined and initiated a phased channel shift strategy that will enhance self-service for its customers, while freeing up customer-facing staff to work on more complex cases and respond more readily to urgent enquiries and more vulnerable customers.

“We knew many of the enquiries coming into our contact centre could be more efficiently dealt with in other channels, but we wanted to take a strategic approach to managing that shift. GOSS has helped us to understand what channel shift means for Moat and to create an action plan that will ensure we get the best results from it.”
– Mandy Samrai, Head of Business Strategy and Planning, Moat

BASILDON ACHIEVES OVER £2M IN SAVINGS

Like every local authority in Britain, Basildon Borough Council is under pressure to reduce its operating costs without affecting the quality of service delivery. For the council, that has meant exploring ways in which its website can work harder to reduce the administrative burden on council staff, while providing better service to the borough’s 172,000 residents.

“GOSS held workshops with all of the council service heads to see where savings could be made by channel shifting to the web. We realised if we could move a third more activity to the web, we could achieve some major efficiency savings.”
– Andrew Pickess, Business Development Manager, Basildon Borough Council
About GOSS

GOSS Interactive are the UK’s leading Public Sector Channel Shift specialists.

In addition to conducting this comprehensive study of public sector Channel Shift attitudes and maturity, we work directly with over 100 Public Sector organisations to implement successful Channel Shift strategies, often delivering annual cost savings into seven figures.

We deliver our Channel Shift products and services in three ways:

1. Website content management technologies and tools

GOSS iCM (Intelligent Content Management) is the content management system underpinning more than 100 public sector websites across the UK, including the Met Office, the BBC and Health & Social Care Information Centre, as well as over 80 local authorities.

Designed to enable customer self-service via desktop and mobile websites, GOSS iCM offers a wealth of Channel Shift functionality for public sector organisations, including online forms, intuitive search, social media integration, and straight-through integration with back-end systems and processes.

With GOSS iCM you can build a website that’s optimised for Channel Shift – and optimised for mobile access and use.

2. Channel Shift consultancy and training

GOSS consultants have enabled numerous public sector organisations to improve and accelerate their Channel Shift initiatives using our ‘Six Steps to Channel Shift’ methodology.

On top of the GOSS Forms & Process Platform is a library of Channel Shift Accelerators – pre-built services that include forms, business process maps, integration and dashboards. We also host a Forms & Process Community, where you can get help with Channel Shift and share best practice.

3. Customer Self-Service Platform

The faster you can encourage people to shift channels, the faster you can realise the cost savings. To speed up the journey, GOSS has developed the ultimate self-service platform for Channel Shift.

The GOSS Forms & Process Platform is made up of four powerful elements:

Forms Expert

GOSS Forms Expert lets you create and implement sophisticated, powerful forms via a user-friendly interface. The drag-and-drop interface enables you to customise your forms for best results, with style options including text boxes, pick lists, radio buttons and check boxes.

Business Process Mapping

Comprehensive easy-to-use Business Process Mapping Tool to help you design and build your processes or browse process maps uploaded by other public sector organisations into the community. Link processes with forms to deliver powerful end-to-end workflows.

Integration

Full access to easy-to-use integration tools and enablers to accelerate deployment across all channels.

Analytics

A dashboard showing real-time savings and the return on investment (ROI) is a great motivational tool for your staff, and a great way to demonstrate efficiency savings to taxpayers and the community.

Get in Touch

Find out how GOSS can help you to develop a Channel Shift strategy that delivers tangible cost savings while transforming service delivery.

W: www.gossinteractive.com  E: enquiries@gossinteractive.com  T: 0844 880 3637
## Appendix – Participating organisations

<table>
<thead>
<tr>
<th>5 Boroughs Partnership NHS Foundation Trust</th>
<th>Axminster Town Council</th>
<th>Bedford College</th>
<th>Bedfordshire Hospitals NHS Foundation Trust</th>
<th>Bedfordshire County Council</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abingdon and Witney College</td>
<td>Bethnal Green Sixth Form College</td>
<td>Bishop Grosseteste University</td>
<td>Birmingham City Council</td>
<td>Birmingham City Council</td>
</tr>
<tr>
<td>AIM University NHS Board</td>
<td>Blackburn Sixth Form College</td>
<td>Blackpool Sixth Form College</td>
<td>Black Country Partnership NHS Foundation Trust</td>
<td>Black Country Partnership NHS Foundation Trust</td>
</tr>
<tr>
<td>Acorns Children’s Hospice Trust</td>
<td>Bloomfield College</td>
<td>Blackpool Sixth Form College</td>
<td>BĦA Group</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Advance Housing and Support Ltd</td>
<td>Bolton Sixth Form College</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Advisory, Conciliation and Arbitration Service</td>
<td>Bolton Sixth Form College</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Age Exchange Theatre Trust</td>
<td>British American Tobacco</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Agriculture and Horticulture Development Board</td>
<td>British Broadcasting Corporation</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Albion Housing Society Ltd</td>
<td>British Gas</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>AmicusHorizon Group</td>
<td>British Heart Foundation</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Aneurin Bevan University Health Board</td>
<td>British Lung Foundation</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Antrim Borough Council</td>
<td>British Medical Association</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>APUC Ltd</td>
<td>British Red Cross</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Architecture and Design Scotland</td>
<td>British Red Cross</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Argyll and Bute Council</td>
<td>British Red Cross</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Arthritis Care</td>
<td>Bristol City Council</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Arun District Council</td>
<td>Business in the Community</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>ASPIRE</td>
<td>Business in the Community</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Aylesbury Vale District Council</td>
<td>Business in the Community</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Babergh District Council</td>
<td>Business in the Community</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Barnsley Hospital NHS Foundation Trust</td>
<td>Business in the Community</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Basildon Council</td>
<td>Ministry of Defence</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Bassett Dairies Council</td>
<td>Ministry of Defence</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Bath and North East Somerset Council</td>
<td>Ministry of Defence</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Belfast City Council</td>
<td>Ministry of Defence</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>BHA Group</td>
<td>Ministry of Defence</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Bield Housing Association Ltd</td>
<td>Ministry of Defence</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Birmingham Children’s Hospital NHS Foundation Trust</td>
<td>Ministry of Defence</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Birmingham Hippodrome Trust</td>
<td>Ministry of Defence</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Birmingham Women’s NHS Foundation Trust</td>
<td>Ministry of Defence</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Bishop Grosseteste University</td>
<td>Ministry of Defence</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Black Country Partnership NHS Foundation Trust</td>
<td>Ministry of Defence</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Blackburn Diocesan Board of Education</td>
<td>Ministry of Defence</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Borough Council of King’s Lynn and West Norfolk</td>
<td>Ministry of Defence</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Borough of Poole</td>
<td>Ministry of Defence</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>BPHA</td>
<td>Ministry of Defence</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Bracknell Forest Borough Council</td>
<td>Ministry of Defence</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Bracknell Forest Homes</td>
<td>Ministry of Defence</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Brantree District Council</td>
<td>Ministry of Defence</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Brandon Trust</td>
<td>Ministry of Defence</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Brighton and Hove City Council</td>
<td>Ministry of Defence</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
<tr>
<td>Brighton and Sussex University</td>
<td>Ministry of Defence</td>
<td>Blackpool Sixth Form College</td>
<td>Bicester College</td>
<td>Bicester College</td>
</tr>
</tbody>
</table>
Shropshire Council
Single Parent Action Network
Social Firms UK
Soha Housing Limited
Solihull Community Housing Ltd
South Devon Healthcare NHS Foundation Trust
South Downs National Park Authority
South Essex Homes
South London and Maudsley NHS Foundation Trust
South of England Specialised Commissioning Group
South Staffordshire and Shropshire Healthcare NHS Foundation Trust
South Tees Hospitals NHS Foundation Trust
South West Commissioning Support
Southend on Sea Borough Council
Southern Health and Social Care Trust
Southwark Council
Southway Housing Trust Ltd
Spinal Injuries Association
Sports Leaders UK
St Helens Council
St. Leger Homes
Staffordshire Housing Association Ltd
Stockport NHS Foundation Trust
Street Child Africa
Student Awards Agency For Scotland
Surrey County Council
Tandridge District Council
Teignbridge District Council
Thames21
The Arts Council of Wales
The Castle School
The Children’s Foundation
The Christie NHS Foundation Trust
The Consumer Council for Water
The Design and Technology Association
The Dorset, Devon and Cornwall Community Rehabilitation Company
The Fostering Network
The Information Commissioner’s Office
The Institute of the Motor Industry
The Isle Of Wight College
The Jewish Council for Racial Equality
The Leasehold Advisory Service
The Leeds Teaching Hospitals NHS Trust
The London School of Economics and Political Science
The Meath Epilepsy Trust
The Mentor Foundation
The Scottish Government
The Tavistock and Portman NHS Foundation Trust
The University of Warwick
The Wellington Hospital
Thenue Housing Association
Thurrock Council
Torbay Council
Torridge District Council
Trent and Dove Housing Ltd
Tunbridge Wells Borough Council
Two Rivers Housing
Tyne and Wear Passenger Transport Executive (Nexus)
UAC
UK Youth
Ulster Farmers Union
United Response
University College London
University for the Creative Arts
University Hospitals Coventry and Warwickshire NHS Trust
University Hospitals of Leicester NHS Trust
University of Aberdeen
University of Exeter
University of Exeter Business School
Unlock
Utterfield District Council
Vectis Housing
Victoria and Albert Museum
VisitScotland
Voluntary Action Fund
Wales and West Housing Association Ltd
Walterton and Elgin Community Homes Ltd
Warrington Borough Council
We Are What We Do
Welsh Government
Welwyn Hatfield Community Housing Trust
West Dunbartonshire Council
West Lothian Council
West Sussex County Council
Wilton Park Agency
Wiltshire College
Wiltshire Council
Winchester City Council
Winston’s Wish
Wirral Community NHS Trust
Wirral University Teaching Hospital NHS Foundation Trust
Wolverhampton City Council
Wolverhampton Homes
Wrexham County Borough Council
York Teaching Hospitals NHS Foundation Trust
Yorkshire Ambulance Service NHS Trust
Yorkshire and Humber Commissioning Support
Yorkshire Cancer Research
Yorkshire Housing Group
Yorkshire Wildlife Trust
Your Homes Newcastle
YouthNet

Get in Touch
Find out how GOSS can help you to develop a Channel Shift strategy that delivers tangible cost savings while transforming service delivery.

W: www.gossinteractive.com  E: enquiries@gossinteractive.com  T: 0844 880 3637

Visit website
www.gossinteractive.com/channel-shift