

The background image shows a contemporary living area. A large, leafy tree stands on the left. In the center, a television is mounted on a white stand, displaying a Windows desktop with a landscape wallpaper and the time 11:17. The room features a brick wall, a wooden door, and a black-framed glass door. The floor is made of light-colored wood. The overall atmosphere is warm and modern.

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PEOPLE. TECHNOLOGY. SOLUTIONS.

# M365 Copilot in Social Service Wales Summary

# Executive Summary

## **Challenges in the Social Care Sector in Wales**

- Critical shortage of care workers
- Reduced revenue streams
- Intensifying workload
- Proliferation of administrative tasks

## **Copilot: A Strategic Solution**

- Streamlines daily operations
- Facilitates efficient task management
- Enhances communication and collaboration
- Provides easy access to essential information and resources

## **Anticipated Outcomes of Deploying Copilot**

- Enhanced care outcomes and increased satisfaction for service users
- Reduce time spent on administrative task

# Social Care Workers in Wales

01

## Highly skilled communicators with resilience and emotional strength

- Keep accurate and up-to-date records of clients' needs, preferences, and progress
- Provide high level of care to clients day and night

02

## Challenges faced by care workers

- Time pressure and heavy workloads
- Emotional stress
- Increasing documentation demand
- Use of legacy business applications

03

## Need for further investment

- Smaller caseloads
- User-friendly IT systems
- Clearer models of social work intervention

# Benefits of Using Copilot: Functional Capabilities

## **Documentation Efficiency**

- Speech-to-Text Technology for accurate transcription of verbal notes
- Text Summarisation for concise summaries of lengthy reports

## **Information Retrieval**

- Natural Language Queries for quick and relevant information
- Semantic Search for deeper understanding of query context

## **Data-Driven Insights**

- Machine Learning and Predictive Analytics for trend and outcome prediction
- Data Visualisation Tools for easy interpretation of trends and patterns

# Benefits of Using Copilot: Strategic Advantages

## **Workload and Stress Reduction**

- **Automation of Repetitive Tasks:** M365 Copilot automates time-consuming tasks such as data entry, appointment scheduling, and form filling.
- **Streamlined Case Management:** By organising and managing case information efficiently, the platform alleviates the burden of manual case tracking.

## **Elevated Practice Quality**

- **Access to Updated Information:** M365 Copilot ensures that social workers have the latest information, policies, and guidelines at their fingertips.
- **Consistent Guidance:** The platform offers standardised templates and protocols for various social work activities.

## **Client Satisfaction and Outcomes**

## **Operational Transparency**



# Current Situation of Social Care in Wales : Challenges

**Welsh Government projects the need for additional 20,000 care workers by 2030**

- Reflects growing demand for social care services

**More than a quarter of registered professionals considering leaving sector within next 12 months**

- Nearly 44% anticipate exiting within next 5 years

**Workload per social care worker expected to increase significantly**

- Potential consequences on quality of care, employee well-being, and overall efficiency

**Strategic measures needed to mitigate challenges**

- Enhancing recruitment, offer competitive remuneration, providing professional development, improving working conditions
- Innovative approaches to care delivery, including integration of new technology

# Challenges of adopting M365 Copilot:



Data Quality



Data Security



Data Governance



Data Complexity



Data Privacy



Ethical Use



Staff Technical Training

# User Case 1 - Adult Services referral process

## Current Process

A multi staged process, that requires 3 teams, 3 phone calls to the requester, various waiting lists and prioritisations, verification and validation of information, before an on-site visit (if required) to assess the situation and create a care plan.

With over 130 calls a week requesting for assistance, the current process is time consuming and vulnerable to missed information or end user error (mis-spelling, mis typed information etc)

## Issues



Repeated queries and multiple calls to the same person



Incomplete Data Capture



Extended Timeframe for Case Resolution

## Possible Copilot Solution

1. Recording of all calls transcribed, analysed by Copilot.
2. Analyses to help complete care plan in the words of the requester
3. Less process and more consistency
4. Requester feels part of the decision making and listened to from the outset



# User Case 2 – Request for residential services

## Current Process

- Collation of an individuals details, file and needs, this can be spread across a number of applications.
- Personal and sensitive data redacted
- Multiple request forms required to be completed
- This process can happen many times during a single week

## Issues



Repetitive process



Vulnerable to human error



Time consuming to read and redact all personal information manually

## Possible Copilot Solution

- With the use of custom graph connectors, Copilot studio extendibility or Teams message extensions – provide an efficient search facility
- Redactions of personal and sensitive information
- Provide clean copies that can be shared without risk to the original
- Automation of form completion (additional M365 capability)

# User Case 3 – Understanding and explaining policies

## Current Process

The sector is governed by an array of policies that are often characterised by their complexity and, at times, intricate language. These policies can be challenging to comprehend, requiring considerable time to thoroughly read and understand.

One of the key challenges lies in effectively communicating the nuances of these policies to care receivers, especially in settings involving children's services.

## Issues

This task is particularly challenging when the explanation is directed towards children. It requires not only a deep understanding of the policies themselves but also the ability to convey this information in a manner that is comprehensible and sensitive to the needs of a younger audience. Ensuring that the message is correctly understood is paramount

## Possible Copilot Solution

1. Copilot's capability to rewrite policies with adjusted vocabulary and tone to suit a lower reading age
2. Copilots ability to create a PowerPoint deck from the document would benefit training of new staff and children that prefer visual aids

# User Case 4 – Chronology of a Social Service file

## Current Process

The creation of a chronology involves meticulously cataloguing each significant event and key decision in a chronological order. This detailed timeline offers a clear and structured view of the progression of the case, ensuring that all relevant milestones and interventions are accurately captured and easily accessible.

## Issues



Repetitive process



Vulnerable to human error



Time consuming


## Possible Copilot Solution

1. Copilot can be strategically utilised to efficiently locate and analyse all pertinent files related to a specific case.
2. Leveraging its advanced capabilities, Copilot can then succinctly summarise these findings into a coherent timeline, highlighting the key events and decisions


## Get in touch

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