

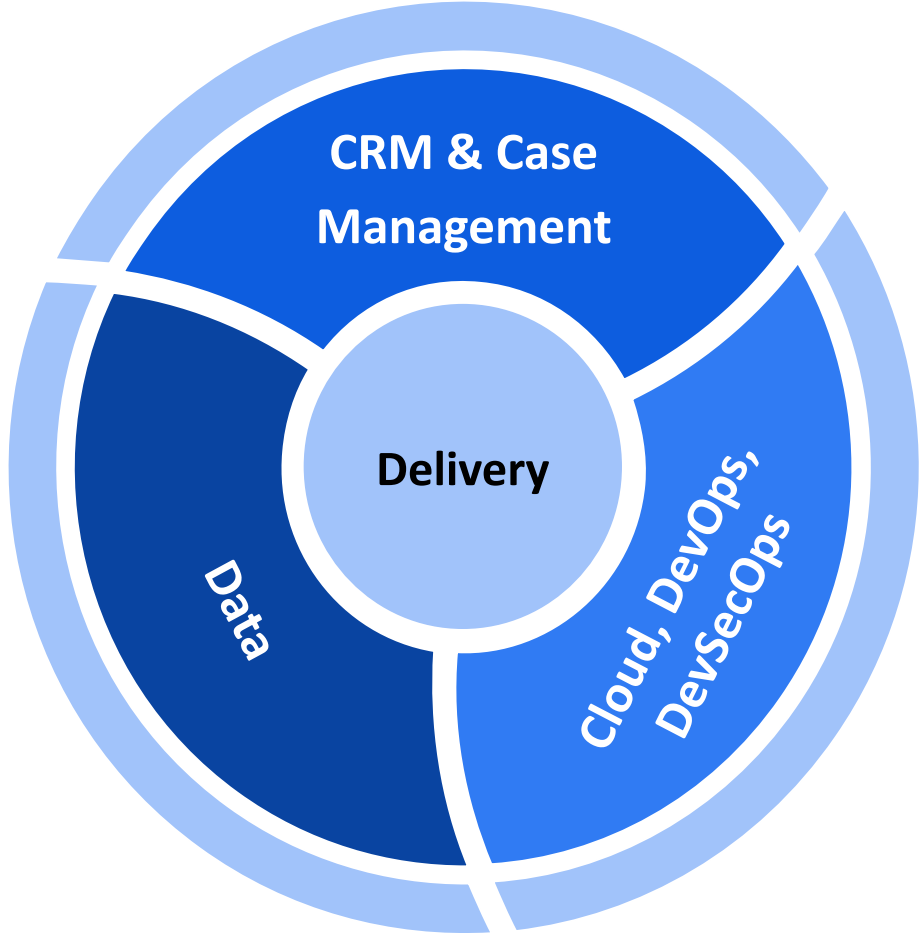


BEIS Energy Bills Support Schemes Case Study

Andy Price

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Our Partnerships



A collection of logos for technology partners. The logos include: Salesforce (blue cloud), Google Cloud (multi-colored), denodo (black with red dots), Exasol (black with white text), EDB (red circle with white text), MuleSoft (blue 'M' in a circle), aws (black with white text), + a b | e a u (orange and blue plus signs), and Microsoft (four colored squares).

Our Customers

A collection of logos for government and corporate customers. The logos include: Department for Business, Energy & Industrial Strategy (UK crest), CIVICA (teal text), Office for National Statistics (green and blue), Poundland (green and yellow), Foreign, Commonwealth & Development Office (UK crest), fiserv. (orange text), St Albans City & District Council (blue and yellow shield), Ministry of Justice (UK crest), Education Scotland (green and white 'S'), Dundee City Council (green and blue), org (yellow text), Home Office (UK crest), HM Prison & Probation Service (UK crest), PARAGON (blue and white text), FUJITSU (red text), and ABTRAN (blue and white text).

- For the Energy Bill Support Scheme, BEIS had to deliver a domestic & non-domestic Alternative Fuel Payment scheme for Great Britain & Northern Ireland
- The schemes are delivering £500m of payments across 1.3m applications
- The platform, including GOV.UK journeys, was to be delivered using Salesforce
- Initial conversations were had with BEIS on the **20 December 2022**
- We delivered the first scheme, live in Private Beta with a GOV.UK journey, contact centre, and Local Authority portal on the **16th of January 2023**
- All 4 schemes are planned to be delivered into Public Beta by the **7 March 2023**

The Project

<https://www.bbc.co.uk/news/business-64760411>

A million households can apply for £400 energy rebate

2 days ago

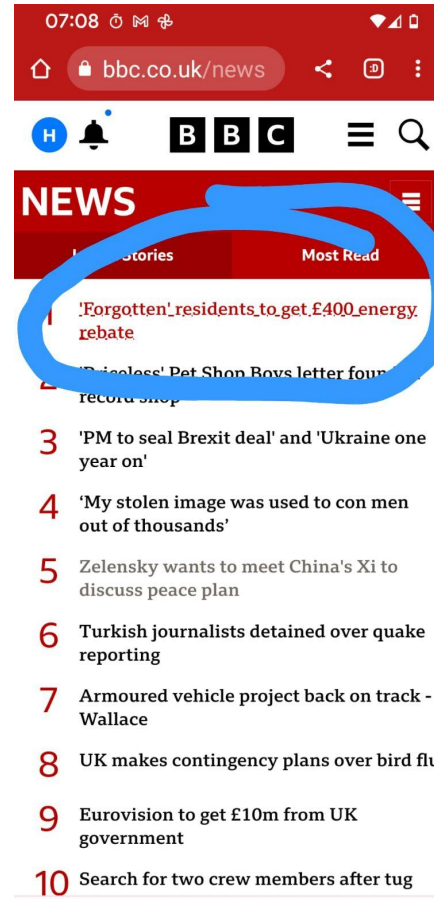


Residents in Nottinghamshire park homes have seen delays in receiving payments

By Colletta Smith & Nicky Hudson
BBC News

Almost 1 million 'forgotten' households now entitled to apply for £400 energy rebate

People who live in holiday parks, houseboats, off-grid or in care homes have been unable to apply for the rebate so far this winter



00:22

12%

Tweet



Rt Hon Grant Shapps MP
@grantshapps

Last night, I said on the @itvMLshow I would look into how many receipts can be submitted through the Alternative Fuel Payment portal.

Today we've changed it - we've upped the number from two to 10 receipts that households can submit to receive their £200 payment.



Department for Energy Secur... · 2d

Do you know someone using:

- ◆ Heating oil
- ◆ Liquefied petroleum gas
- ◆ Coal...



Tweet your reply



The Ask - 9 Weeks to Deliver 4 Schemes to Public Beta

The Scope

- 4 x Energy Schemes
- 4 x GOV.UK Journeys using Salesforce Front End
- 4 x Assisted Digital Journeys in Salesforce
- 4 x CRM Portals using Service and Experience Cloud
 - Local Authority Portal for Payment Processing
 - Contact Centre Portal for Assisted Digital, Application Support and Case Management
 - Contact Centre portal for Payment Processing
 - CRM portal for BEIS users
- 10 x Integrations including Gov.Notify
- 5 x Data Migrations
- Dashboards, Reports and Data Extracts for MI
- New Salesforce Environments from Dev through to Production

The Volumes

- 1.1m submitted applications - domestic and non-domestic
- Great Britain and Northern Ireland
- All 333 Local Authorities
- 1500 Local Authority Users
- 120 Contact Centre Users
- 40 Payment Processing Users
- Over 800 User Stories

Other Asks

- WCAG 2.1 Accessibility Compliance
- NCSC Security Compliance
- GDS Service Assessment
- Multi-Factor Authentication
- Support for onboarding and training

- Utilised our *Rapid Salesforce Delivery Framework*
- Focus on Build and not consulting
- Pre-scoping workshops to identify critical delivery risks and focus areas for ourselves, Salesforce and BEIS
- Worked with BEIS on definition and prioritisation of User Stories
- Agreed a common way of working and a joint 'can do' delivery culture
- Delivered the MVP for Private Beta, and then iterated with further functionality and automation for Beta.

4 Workstream Approach

- Salesforce Front-End Build
- Integration Build
- Salesforce CRM Build
- Security, IT Service & User Onboarding

Our Rapid Delivery Framework

- Our framework consists of the core elements needed to deliver a successful project



Delivery

Kick-Off Survey

Agile Methodology

Jira Project

Epics & User Stories

Phased Delivery Plan



Architecture

Reference Architecture

Front-End Components

Object & Data Model

Security & GDPR

Identity & Roles



Design

Design Principles

Design Governance

Design Patterns

Coding Standards

Integration Patterns



Pre-Built

Common Service
Integrations

DevOps Process &
Tooling

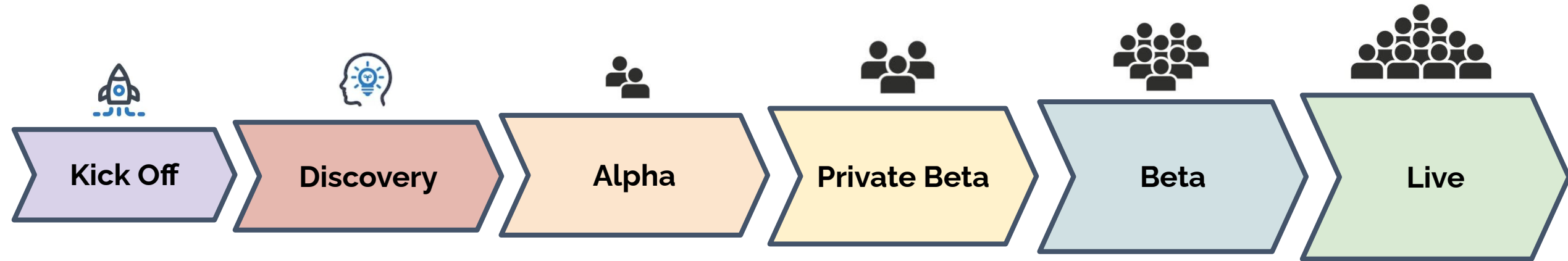
Customised Online
Training

IT Support Portal

Reports & Dashboards

Our Rapid Delivery Framework

- Our lifecycle incorporates InfoSec, Data and GDS Assessment Assurance



- Capture Project Information
- Work with Client on Prioritisation
- Onboard teams
- Establish environments

- Scoping & Phasing
- Epic Definition
- User Research
- Prototype
- Principles
- Team & Delivery Planning
- Strategies
 - Security
 - Data
 - Environments
 - DevOps

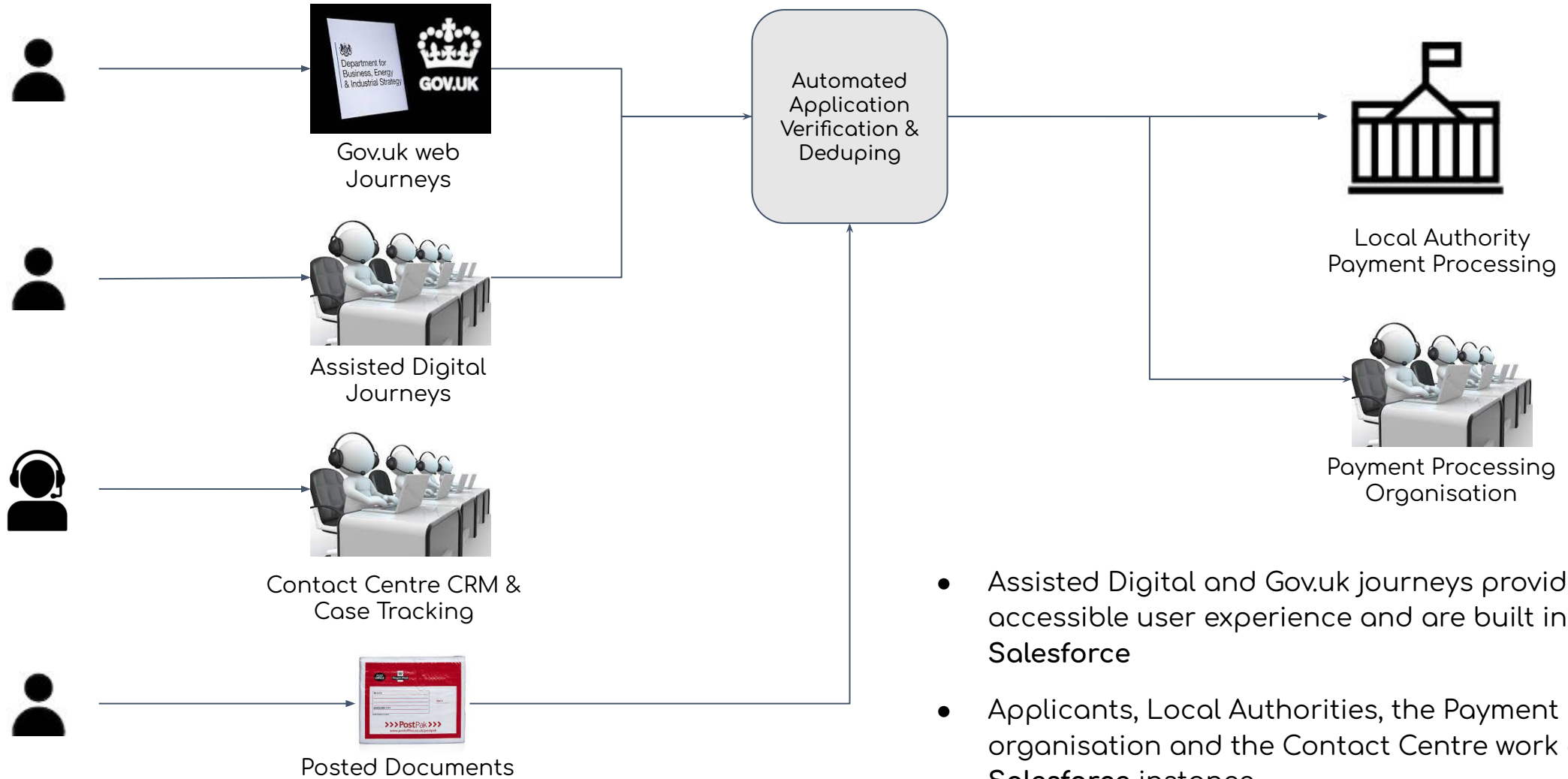
- Sprinting
- User Story Definition
- Build Out Salesforce
- Set Up Environments
- Testing
- User Testing
- Data Prep & Cleansing
- Service Transition Prep
- Security Reviews
- Integrations
- Select Apps

- Data Transition
- Live users
- User Feedback
- Build out solution
- Establish Live Service Processes
- User Support
- Set-Up Roles and Users
- Training
- Rollout Planning

- Live users
- User Feedback
- Build out solution
- Service Support
- Training
- Rollout

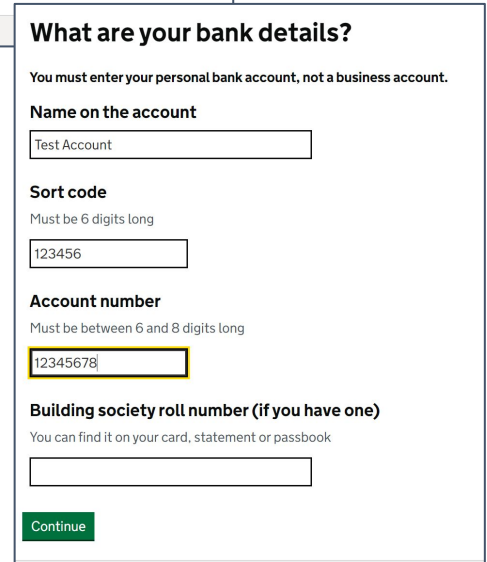
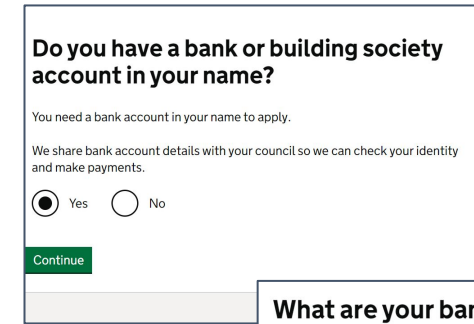
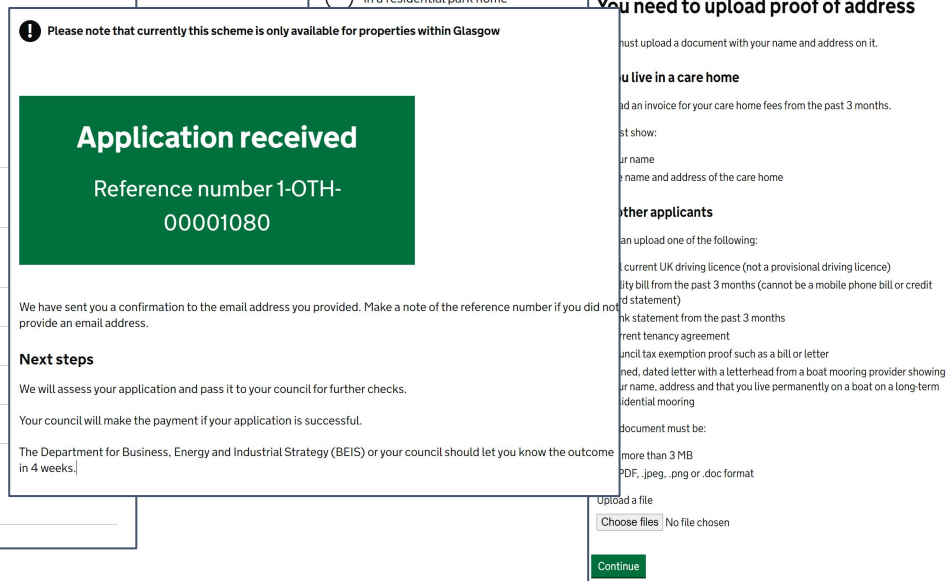
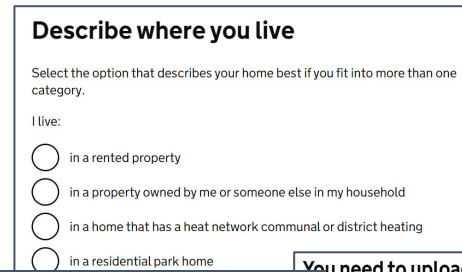
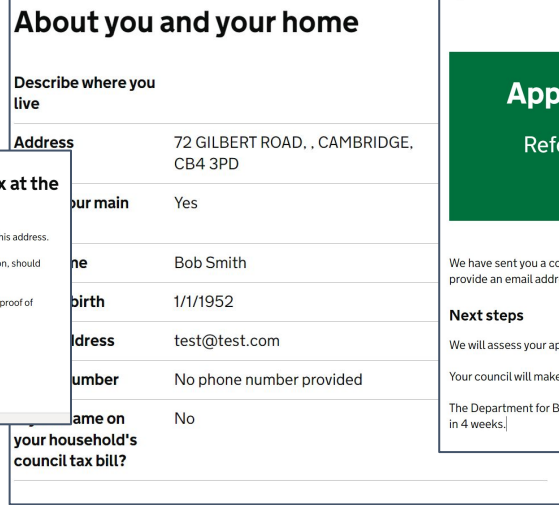
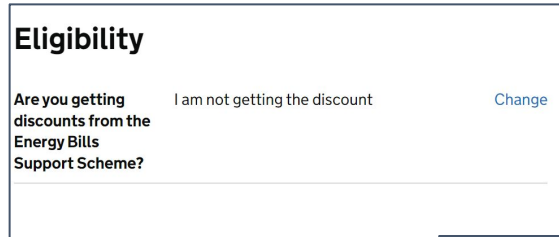
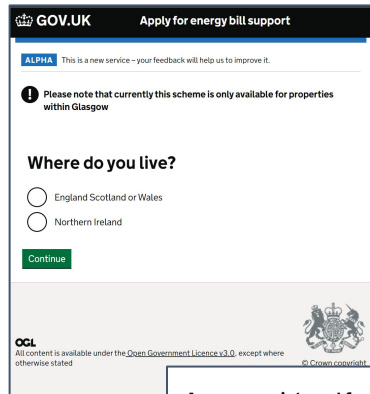
- Service Support
- Service Enhancements
- Benefits Tracking
- Knowledge Transfer
- Continuous Improvement

What We Built



- Assisted Digital and Gov.uk journeys provide the same accessible user experience and are built in Salesforce
- Applicants, Local Authorities, the Payment Processing organisation and the Contact Centre work off the one Salesforce instance

- Used Salesforce Front End components - WCAG Accessible
- 4 Journeys across GB and NI, along with Domestic and non-domestic applicants



Local Authority Processing Portal

- Ability to Validate Applications, reject and approve Payments
- Ability to view and manage cases
- View Dashboard Reports

The screenshot shows a detailed view of a case (00001172) for Helen May. The form is divided into several sections:

- Case Information:** Case Number (00001172), Applicant Reference (14P-00001172), Case Record Type (ESB Alternative Fund), Applicant User Group (Tenants (Private)), and Applicant Reference (14P-00001172).
- Local Authority Application Validation:** A section with instructions: "You should review the application details and check that the applicant, Helen May, is valid at or is responsible for the energy bills of Unit 1/10 151 GEORGE STREET, G1 1AB." It includes a "Check Applicant is Valid Party" section with a note: "The applicant has been identified as a 'Valid party for council tax' at the property to which this should be verified within your Revenue system." There is a "Next" button at the bottom.
- Address Details:** Address Line 1 (UNIT 1/10 151 GEORGE STREET), Address Line 2 (CITY CENTRE), Address Town (GLASGOW), Local Custodian Code Description (CITY OF GLASGOW), and Residential Code (Residential Education).
- Central Validation:** Internal Duplicate Check Status, Fraudulent Application Flag, and Fraudulent Application Paid.
- Local Authority Validation:** Applicant Name (City of Glasgow (15151)) and Documentary Evidence Required.

The screenshot shows a dashboard titled "LA Applications for Validation" with 32 items. The table lists applications with columns for Case Number, Applicant Reference, Date/Time Opened, Web Name, Address Line 1, Address Town, UPRN, and Local Custodian Code.

Case No.	Applicant Ref.	Date/Time Opened	Web Name	Address Line 1	Address Town	UPRN	Local Custodian Code	
1	00001148	11/01/2023, 12:09	James McCleod	4 HANOVER STREET	G1 1GA	GLASGOW	9067003677... CITY OF GLASGOW	
2	00001197	1-RP-00001197	13/01/2023, 10:41	Doug Guthrie	UNIT 1/1 151 GEORGE STREET	G1 1AB	GLASGOW	9067005192... CITY OF GLASGOW
3	00001204	1-HO-000012...	13/01/2023, 11:56	Sam Jones	UNIT 2/1 151 GEORGE STREET	G1 1AB	GLASGOW	9067005192... CITY OF GLASGOW
4	00001209	1-FA-00001209	13/01/2023, 15:53	Doug Guthrie	UNIT 1/3 151 GEORGE STREET	G1 1AB	GLASGOW	9067005192... CITY OF GLASGOW
5	00001210	1-PH-00001210	13/01/2023, 16:12	TEST User	LEVEL 3/SU16 BUCHANAN GALLERIES 220 BUCHANAN STRE...	G1 2GF	GLASGOW	9067003096... CITY OF GLASGOW
6	00001225	1-PH-00001225	13/01/2023, 17:24	test user	LEVEL 3/SU24 BUCHANAN GALLERIES 220 BUCHANAN STRE...	G1 2GF	GLASGOW	9067003201... CITY OF GLASGOW
7	00001234	1-FA-00001234	16/01/2023, 09:09	Douglas Guthrie	ST FRANCIS CARE HOME 54 MERRYLAND STREET	G51 2QE	GLASGOW	9067003554... CITY OF GLASGOW
8	00001265	1-RP-00001265	16/01/2023, 12:05	Harry Potter	ABERCORN SECONDARY SCHOOL 195 GARSOUBE ROAD	G4 4QH	GLASGOW	9067000484... CITY OF GLASGOW
9	00001335	1-RP-00001335	17/01/2023, 15:26	John Smith	BAINNATHYNE SPA HOTEL HORRINGER ROAD	IP29 5PH	BURY ST EDMUND...	10009748436 WEST SUFFOLK
10	00001352	1-TF-00001352	17/01/2023, 17:05	TEST AN	LEVEL 3/SU18 BUCHANAN GALLERIES 220 BUCHANAN STRE...	G1 2GF	GLASGOW	9067003096... CITY OF GLASGOW
11	00001360	1-FA-00001360	17/01/2023, 22:34	Ian Rush	FLAT 3/4 11 SPRINGFIELD GARDENS	G31 4HT	GLASGOW	9067004255... CITY OF GLASGOW
12	00001439	1-RP-00001439	18/01/2023, 13:00	Barbara Dixon	4 HANOVER STREET	G1 1GA	GLASGOW	9067003677... CITY OF GLASGOW
13	00001440	1-RP-00001440	18/01/2023, 13:02	Joe Cooder	UNIT 1/3 151 GEORGE STREET	G1 1AB	GLASGOW	9067005192... CITY OF GLASGOW
14	00001452	1-FA-00001452	18/01/2023, 15:34	Douglas Guthrie	20 AUSTEN ROAD	G13 1SU	GLASGOW	9067000084... CITY OF GLASGOW

The screenshot shows a dashboard titled "LA Applications for Payment" with 7 items. The table lists applications with columns for Case Number, Applicant Reference, Status, Date/Time Opened, Web Name, Address Line 1, Location, and Local Custodian Code.

Case No.	Applicant Ref.	Cr...	Status	Date/Time Opened	Web Name	Address Line 1	Loc...	Local Custodian C...
1	000011...	1-PH-00001167	Cancelled	13/01/2023, 08:51	Ropert De Ne...	UNIT 2/2 151 GEORGE STREET	90...	CITY OF GLASGOW
2	000011...	1-RP-00001172	LA Payme...	13/01/2023, 09:31	Helen May	UNIT 1/10 151 GEORGE STREET	90...	CITY OF GLASGOW
3	000013...	1-PH-00001348	LA Payme...	17/01/2023, 16:56	test name	LEVEL 3/SU19 BUCHANAN GALLERIES 220 BUCHANAN S...	90...	CITY OF GLASGOW
4	000013...	1-RP-00001354	LA Payme...	17/01/2023, 17:41	Stewart Smith	LEVEL 3/SU23 BUCHANAN GALLERIES 220 BUCHANAN S...	90...	CITY OF GLASGOW
5	000013...	1-TF-00001357	LA Payme...	17/01/2023, 20:05	John Barnes	FLAT 1/1 3 BELLGROVE STREET	90...	CITY OF GLASGOW
6	000013...	1-TF-00001385	LA Payme...	18/01/2023, 08:05	Mr Ollie Nutt	STOREY 5/6 82 MITCHELL STREET	90...	CITY OF GLASGOW
7	000015...	1-RP-00001539	Cancelled	19/01/2023, 16:06	Domestic test	26 TAYMOUTH STREET	90...	CITY OF GLASGOW

Contact Centre Portal

- Process Applications for assisted digital over the phone
- Provide validation of applications
- Application support and feedback

Energy Schemes Home Accounts Contacts Cases Reports Dashboards Files

Search...

EPT: 0.32 460.41 KB

Energy Schemes

Cases New EBSS Applications

14 Items • Sorted by Case Number • Filtered by All cases • Status: Case Record Type: Local Custodian Code • Updated a few seconds ago

Search this list...

Case Number	Applicant Reference	Created By	Status	Date/Time Opened	Web Name	Address Line 1	Local Cu...	Local Custodian Code
1	00001015	1-TEN-00001015	hmay	New	09/01/2023, 11:15	Gary Craven	WY WURRY STOKE HILL	3305 MENDIP
2	00001016	1-TEN-00001016	hmay	New	09/01/2023, 11:24	Gary Craven	WY WURRY STOKE HILL	3305 MENDIP
3	00001017	1-TEN-00001017	hmay	New	09/01/2023, 11:28	Gary Craven	CHERRYCROFT STOKE HILL	3305 MENDIP
4	00001030	1-TEN-00001030	dguthrie	New	09/01/2023, 12:31	Doug Test	62 GILBERT ROAD	505 CAMBRIDGE
5	00001031	1-TEN-00001031	hmay	New	09/01/2023, 12:32	Gary Craven	1 STOKE HILL	3305 MENDIP
6	00001035	1-TEN-00001035	hmay	New	09/01/2023, 12:45	Gary Craven	1 STOKE HILL	3305 MENDIP
7	00001059	1-TEN-00001059	hmay	New	09/01/2023, 14:04	Gary Craven	CORNER COTTAGE STOKE HILL	3305 MENDIP
8	00001064	1-TEN-00001064	hmay	New	09/01/2023, 14:50	Gary Craven	ASHTON STOKE HILL	3305 MENDIP
9	00001065	1-TEN-00001065	dguthrie	New	09/01/2023, 15:26	Douglas Guthrie	68 GILBERT ROAD	505 CAMBRIDGE
10	00001071	1-TEN-00001071	hmay	New	09/01/2023, 15:56	Gary Craven	Yellow House	3305 MENDIP
11	00001073	1-TEN-00001073	hmay	New	09/01/2023, 17:56	Gary Craven	OAKSIDE 134 BLACKBOY LANE	3815 CHICHESTER
12	00001074	1-TEN-00001074	hmay	New	09/01/2023, 17:59	Gary Craven	UNIT 1/4 151 GEORGE STREET	9067 CITY OF GLASGOW
13	00001079	1-TEN-00001079	guest	New	09/01/2023, 20:20	Doug Guthrie	68 GILBERT ROAD	505 CAMBRIDGE
14	00001080	1-OTH-00001080	guest	New	10/01/2023, 07:58	Bob Smith	72 GILBERT ROAD	505 CAMBRIDGE

Energy Schemes Home Accounts Contacts Cases Reports Dashboards Files

Search...

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Energy Schemes

Tips EBSS (v6) Top Up Apply Integration Demo EBBS (v5)

Where do you live?

England Scotland or Wales

Northern Ireland

[Continue](#)

Assistant

Nothing needs your attention right now. Check back later.

Recent Records

Cases by Origin and Open Status

Doug Guthrie

Cambridge Council (TEST)

00001069

00001065

[View All](#)

Today's Events

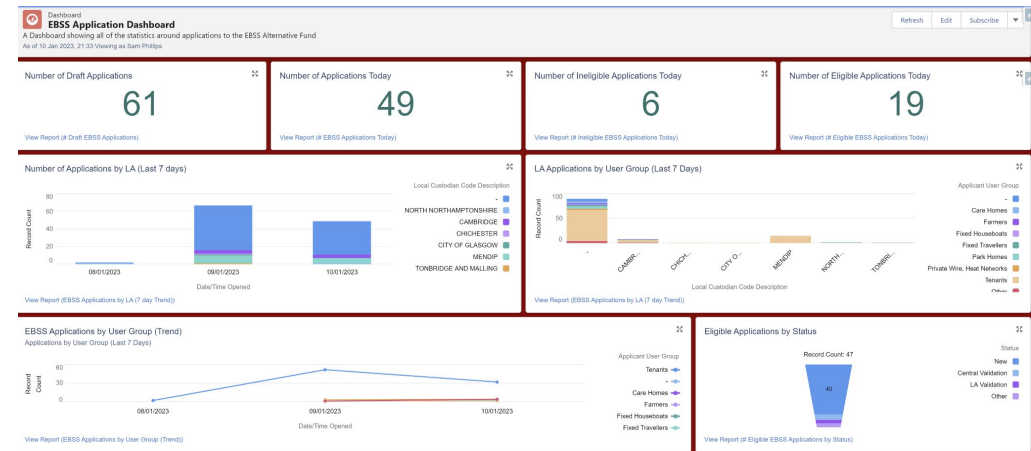
Looks like you're free and clear the rest of the day.

[View Calendar](#)

Today's Tasks

Nothing due today. Be a go-getter, and check back soon.

[View All](#)



- Identify, procure and manage a 3rd party NCSC Check compliant Security Consultancy for Security Testing
- Procure, distribute and manage Yubikey MFA tokens for Local Authorities and the Contact Centre users
- Support the GDS Assessment and Critical Service reviews
- Service walkthrough and training overview documentation for Local Authorities and the outsourced Contact Centre
- Provide DPIA & Information Security support for BEIS and the Local Authorities
- Local Authority and Contact Centre User Support

The BEIS Team Feedback

- Very positive GDS Service Assessment - “Inspirational”
- Shout out to DM for the volume of work they got through
- Successful delivery to private beta in very short timescales
- Delivered LOADS in hardly any time
- Managed to establish collaborative ways of working that lead to a good understanding
- DM team team were friendly and approachable even when I asked for short notice things
- Team worked really well together and supported each other
- Component creation and reusability across schemes





Thank You

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