



A CASE STUDY

Kent County Council's client financial services officers, who look after the financial affairs of 1450 vulnerable individuals, 'couldn't do their job' without Trojan's Caspar.

Most local authorities in England and Wales handle significant Deputyship and/or Appointeeship caseloads, whereby case handlers manage benefits and bill-paying for vulnerable individuals. But at Kent County Council, the numbers run particularly high: at the last count the team of around 19 officers and managers had a combined caseload of 1450 clients. More than half of those are Deputyship cases, which are more intensive administratively and require formal, client-specific reporting to the Office of the Public Guardian (OPG).

With such a high volume of case files, the Financial Affairs Team has faced a considerable challenge to keep on top of client requirements and fulfil its reporting responsibilities, but it now manages this admirably with the help of a bespoke software system from Trojan Consultants, known as Caspar, which the Council implemented in 2013.

Making light work of heavy caseloads

For many years, the team handled much of the financial balancing and reporting in a very manual way – each officer managing the reconciliations for around 150 clients. Tallying internal records of client spending with online bank statements was done line by line – using print-outs and highlighter pens. Meanwhile OPG reports, required by the OPG for Deputyship cases, would involve exporting files into spreadsheets, creating tabs for each spending category, cross-referencing every item, and then performing individual calculations. This process could take hours, particularly if any discrepancies were spotted - requiring further checking and investigation.

Even when the Council first implemented Caspar, the team had a hard time letting go of traditional ways of working but, as the software continued to evolve, it was obvious that officers were missing a trick.

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“Caspar’s support for OPG reporting has been an absolute lifesaver,” says Client Financial Services Team Manager Stephanie Walker. “We now have one dedicated person who produces OPG reports for every client – that’s around 730 each year. Before, it was something each officer had to try to manage themselves, taking time away from everything else they needed to do. Now Caspar takes care of most of it automatically, which has made a huge difference.”

Indeed, the time savings and efficiency gains enabled by Caspar have been transformational generally, Stephanie says. “Aside from reporting, we use the Notes section as an ongoing diary for clients: a living record of each client file. We don’t have any other client system, and our previous database had become too unwieldy, so we absolutely needed help with coordinating everything. It’s no exaggeration to say that, without Caspar, we simply couldn’t do our job.”

Caspar Cloud multiplies the automation potential

Recently, Trojan visited Kent County Council to demonstrate its new Caspar Cloud product, an advanced next-generation version of the Caspar system which customers will be able to access on a hosted, Software-as-a-Service (SaaS) basis.

The Client Financial Services Team was ‘blown away’ by what it saw. “Everything about Caspar Cloud excites us. We’re putting together the business case for it now. The automatic reconciliation; the fact that you can do this person by person instead of by officer; the way everything is more visual – Caspar Cloud looks very impressive,” Stephanie enthuses.

Of Trojan as a company, she is effusive. “I am always struck by Trojan’s willingness to listen to their customers, and to incorporate whatever requests and changes we’ve asked for into the product,” Stephanie says. “They seek feedback at every meeting, whether that’s the annual user group or a smaller local event. After our demo of Caspar Cloud, Larry, Trojan’s commercial director, stayed on and took over a page of notes about our response to the system. I have never worked with any external provider who does that; who is so keen for feedback and who actively seeks to make our life easier. I really appreciate that from Trojan.”

“Their software has already substantially transformed the work we do, and we look forward to taking full advantage of Caspar Cloud with all of its additional capabilities.”

Talk to our team to find out more



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