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Case study

Service
Data & Analytics

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Creating order from chaos – Richmond Fellowship's data revolution

Using Data as a Service meant that Richmond Fellowship didn't need a big, expensive team to cover all its data needs, but could pick those that would be most useful at the time and supplement their own capabilities.



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Richmond Fellowship, part of Recovery Focus, is a national charity that aims to make recovery a reality for thousands of people suffering mental health, domestic violence, and drug and alcohol abuse every year.

Since 2019, more than 120 people at Waterstons have provided over 700 days of work to the charity, specifically focused on a digital transformation and data.

The background

Richmond Fellowship came to us in 2019 after taking stock of its operations and looking for a partner to support and digitally transform the services that had mainly been brought in-house.

It wasn't long before both parties realised that there was organisational synergy and personality alignment, and what was originally a discussion about SharePoint and minor service management improvements turned into a (successful) tender for managed service and infrastructure refresh, and Office 365 implementation.

The success of this relationship meant that when Richmond Fellowship was looking for a partner to help build a data platform, extending the relationship with Waterstons into the Data and Analytics team was the natural choice.

A central view

As part of the wider Recovery Focus umbrella, each charity has different operating models and styles of working, all while managing a significant level of risk.

The KPI 'dashboard' was a basic Excel spreadsheet with many contributors adding data at any time, often after manually crunching large datasets. There were several systems across the organisation all holding critical data, and the high level of risk due to the charity users meant having an overall view and insight into the data was critical, but difficult.

After the termination of a contract, a Richmond Fellowship review showed that better gathering, reading and use of data would have provided critical insight much earlier; had all data been in one place.

It was time for a change, and to move on from Excel.

Ambition for a digital solution

The team knew what they thought they wanted – a digital dashboard allowing the case management system, HR and finance, and ticketing systems to all feed into a data lake, then get valuable data from it.

Along the way, a few discoveries were made:

- There were low levels of data literacy within the organisation
- There was no real data governance due to various parts of the organisation operating differently
- The structure and quality of the data gathered was poor
- That a digital dashboard was only one element of what could be a much more impactful exercise
- That with patchy vision and no roadmap, any solution developed at this stage wouldn't stand the test of time.

Despite these discoveries, the minimum viable product dashboard was created within the project scope and generated significant improvements from front line managers when it came to accessing and reading data in an interactive way.

A never-ending story

As we expected, the digital dashboard was just the start. Having gained substantial understanding of the organisation and the team, we looked at further ways we could support through a trial of Data as a Service. This gave Richmond Fellowship access to both technical and consultancy experts to keep the platform progressing, but also raise the quality of thinking about data.

The workshops enabled a culture shift across the organisation – people were really engaged and understood where the business needed to get to. They understood that it wasn't about the dashboard but changing the whole business.

Becoming data-driven

For us, using data lakehouses, PowerBI and other tools isn't simply for the sake of having a certain technology, but for them to help clients become more data-driven.

Without quality data, it's difficult to launch, sustain or complete a technical data project – which is why becoming data-driven from the outset is so valuable. It's not just the Power Bi report at the end of each month and the shiny dashboard, but everything that happens to the data before that to ensure it is the right data to make those critical decisions.

Using Data as a Service meant that Richmond Fellowship didn't need a big, expensive team to cover all its data needs, but could pick those that would be most useful at the time and supplement their own capabilities. The benefit of having a third-party can be to bring new energy and expertise to an issue, which we did by supporting cultural change and developing a framework for how Richmond Fellowship would treat data in the future. This transformed the perception of data to be the same as any other business asset, enabling effective decision-making, ultimately growing a culture of data generation, storage and use.

Getting a taste of what good data practice can accomplish helped get buy in from people who maybe wouldn't be as on board otherwise.

Results

Every challenge we encountered alongside Richmond Fellowship was met with a solution-driven attitude, which meant we were able to try new or different approaches than we may have planned.

As a result, KPIs are now automated and, having now rolled out to over 150 service managers with varying degrees of data literacy, this enables effective, efficient and intuitive report generation – getting the data needed in as few clicks as possible.

This also enabled all senior leaders access to all data at any time, meaning it was easy to see where was and wasn't performing, and where improvements were needed, before they became problematic.

All members can now access more data, more quickly, with more relevance than ever before, but it can also be developed in the future as and when it's needed.

"The epitome of demonstrating how beneficial this has been, is that I found the data and trending analysis needed for a funding application, from real-time data, in five minutes.

"Waterstons is a growing business that truly cares about relationships; they work with us to understand and decide what can be changed or moved to make improvements, they challenge us, and they always provide solutions regardless of the problem.

“Over time the support we have received from the team has changed and developed, but we know we can rely on Waterstons, that they put us and our business first, not their own revenue.

“The team listens, understands, adapts and we have created a true partnership.”

Adrian Robinson, Assistant Director – IT Systems and Information at Richmond Fellowship

“We chose Waterstons because of the alignment of values; we really liked the fact that it was about putting people first and that was demonstrated from the very start. I’m not a techy person at all, but know what I wanted to do – so we knew we worked well together.

“Everything we’ve done together, and everything that has been achieved, is as a result of the relationship we have with Waterstons, and the sense of humour we share. Problem solving, finding solutions, picking ourselves up, and the continuous laughter along the way, meant that we were able to get to a place that we didn’t expect, but was so much better than what we planned.

“When the project was finished, the team truly embraced and enjoy using the dashboard which is a huge testament to the product that was created.”

Tracey Bell, former Group Director of Performance, Quality and Innovation at Richmond Fellowship