

# The future of advice

Our strategic framework 2019-2022



citizens  
advice

# We're Citizens Advice

**We give people the knowledge and the confidence they need to find their way forward – whoever they are, and whatever their problem.**

Our network of charities offers free, independent and confidential advice. No one else sees so many people with so many different kinds of problems, and that gives us a unique insight into the challenges people are facing today. A lot has changed over the 80 years we've been around.

Our foundations are strong, but we've got plenty more to do so that we can help more people. Demand for our services still far outstrips what we can provide. To keep delivering on our ambition, we need to continually transform the way we do things, to meet the changing needs of our clients, keep pace with rapid technological advances, and stay ahead in an increasingly competitive funding environment.

We've developed a strategic framework, as distinct from a fixed strategy, to give us the flexibility to respond quickly to a rapidly changing world. It sets out a clear direction and parameters, within which we can try new ways of doing things and keep adapting to what people need.

## We're here for everyone

**When we say we are here for everyone, whoever they are and whatever their problem, we mean it - and we recognise that not everyone is the same. Equality, diversity and inclusion are in our DNA and therefore at the heart of this framework. Our advice is for everyone and we design our services to work for a range of needs, including those with the most complex problems or where the number of people affected is small.**

# Our vision for 2022



**You won't ever struggle to get help from us**

Our services will be available when you need them in a way that works for you



**Our service will be joined up**

You'll be able to access advice quickly and easily through our different services and channels, without having to repeat yourself



**We'll help you find a way forward, whatever your problem**

We have the resources, tools and expertise to solve your problem. If we can't help directly, we'll signpost you or make a smooth referral to a trusted partner



**You'll get the level of support you need**

Whatever your situation, we'll take extra steps to make sure you have the best support for your needs



**You know that we'll speak up for you**

We'll advocate for change in government policy and industry practices where they make life harder for you

We've identified 5 focus areas to help us make our vision a reality.

# 1. Advice

We'll continue to improve people's experience of our service, so that everyone leaves us with the knowledge and confidence they need to find a way forward.

## Our ambitions for 2022

- We'll provide a seamless customer journey that allows people to move between online, phone and face to face support without repeating themselves
- We'll expand alternative ways to access our services, for example through video-calling and chat
- We'll double the number of calls we're able to answer and quadruple the number of chat queries we're able to respond to
- We'll set ambitious targets for minimum waiting times for face to face appointments
- We'll ensure that our services are accessible and relevant to a diverse range of people, including those at greater risk of disadvantage, detriment or harm

### Example seamless journey:

Sarah has a bailiff at the door



Sarah went online and found helpful advice on how to stop bailiffs getting in



An adviser was available via chat to talk her through what to say and give her confidence



Once the bailiffs left the adviser suggested she get help from a specialist debt adviser

They discussed the type of session that would suit her best



She works and has children so wanted to continue online, so she booked an evening video call session once her kids were asleep



She got an email with forms and instructions on how to upload them for the adviser

She got a reminder message a few days before her session



The initial case notes meant the adviser could help her apply for a debt relief order quickly



With the debt relief order sorted, the adviser books her in for a financial capability session

## 2. Advocacy

---

We'll be an even stronger voice on issues that matter most to the people who need our help.

---

### Our ambitions for 2022

- We'll continue to tackle the underlying causes of our clients' problems by developing and testing practical solutions alongside advocating for policy change
- We'll use new channels, formats and tactics to influence policy-makers
- We'll continue to harness one of the key strengths of our service: being able to advocate locally and nationally to achieve change
- We'll achieve change for everyone, including groups small in number but experiencing greater disadvantage, detriment or harm

## 3. Technology

---

We'll use technology to enable a positive experience for everyone, and free up resources to meet more demand.

---

### Our ambitions for 2022

- We'll invest in best-in-class platforms to support a seamless customer journey, make our services more accessible and free up adviser time to help more people
- We'll test new ideas - particularly around machine learning and automation - and scale up innovations at pace if they work for our clients
- We'll continue to design and develop our products and services based on what our users need
- We'll ensure our user research includes groups who could be at risk of digital exclusion

## 4. Sustainability

---

We'll underpin our future as a service by ensuring we take a collaborative, proactive and commercial approach to securing and maintaining funding.

---

### Our ambitions for 2022

- We'll stay focused on working with existing funders and supporters of our services, whilst exploring new sources of income
- We'll develop our local and national partnerships to enhance and expand our offer to our clients
- We'll deliver an even more compelling, high value for money offer to funders of our service
- We'll make sure that the way we design and cost services takes into account the needs of disadvantaged groups



## 5. Culture

---

We'll be a collaborative, innovative and high-performing service that challenges discrimination and promotes equality, diversity and inclusion.

---

### Our ambitions for 2022

- We'll continue to build a culture that is collaborative and innovative and that adapts to the changing needs of our clients
- We'll roll out best-in-class digital tools to help us share knowledge and take full advantage of the expertise and creativity of our staff and volunteers
- We'll ensure people's perception of Citizens Advice matches the modern, innovative service we've become and use our brand to attract and retain the best talent
- We'll achieve greater equality of opportunity within our workforce, and set ourselves challenging diversity and inclusion objectives



## How we'll measure progress →

We'll measure ourselves against the ambitions set out in each area of the framework. Our overarching goal is to help more people solve their problems and find a way forward in a way that works for them.

So we'll use our sector-leading data and insights, and measure the same 3 indicators across online, phone and face to face advice:

- Demand met
- Problems solved
- Client satisfaction

We'll analyse this to understand how we're performing across different client groups, to ensure that we truly are here for everyone, whoever they are and whatever their problem.

## Learning and sharing as we go

As we develop ways to meet our ambitions, we'll make sure we're sticking to a few underlying principles that are already reflected in the way we work:

- All our decisions start with the people we help and are rooted in data and evidence
- We work together and learn as we go
- We're open, transparent, and share what's working and what's not

To see the latest on our progress, visit [wearecitizensadvice.org.uk](https://wearecitizensadvice.org.uk).



[citizensadvice.org.uk](https://citizensadvice.org.uk)

Published May 2019

Citizens Advice is an operating name of The National Association of Citizens Advice Bureaux.  
Registered charity number 279057