

Using signposting and referral systems to understand and support the user journey

Insights and Learning Session

Tuesday 24 October, 10:00am-11:30am

Via Zoom: [Register here](#)

Purpose

We know that our users usually experience more than one issue and often access our services at a time of extreme distress.

We can't always offer all the services our users need, so signposting and referrals can offer the most holistic solution reducing the burden on the user to triage and access other services.

This session will explore the opportunities and challenges that implementing signposting and referral systems can offer our services, and our users, as well as looking at what additional insight these systems can generate on the user journey and experience.

Speakers

- **CAST** – Dan Sutch, Director
- **Homeless Link** – Isabel Langdale, Project Manager, National Practice Development Team
- **Liverpool Access to Advice Network (LATAN)** – Liz Reed, Network Development and Project Coordinator
- **Norfolk Community Advice Network (NCAN)** – Ben Scarlett, Director
- **Personal Finance Research Centre** – Sharon Collard, Professor of Personal Finance and Research Director

Agenda

#	Item	Content	Time
1	Welcome and introductions		10:00am
2	An overview of signposting and referral systems	<ul style="list-style-type: none">• Terminology – mapping, signposting, and referring.• What is the problem we're trying to solve.• What the research tells us about how signposting and referral systems can help.	10:05am
3	What goes into building a system	<ul style="list-style-type: none">• Key barriers and challenges facing implementation.• What it takes to build a system build with an inclusive design approach.• The role of funding approached in achieving impact.• The role of partnerships and a collaborative, community focused approach.• How we can scale these models to include national services.	10:15am
4	What these systems give and tell us	<ul style="list-style-type: none">• Key elements of successful delivery models, and best practice.• What systems data can demonstrate.• How systems can best identify and track user outcomes.	10:55am
5	Next steps/ future research	<ul style="list-style-type: none">• What gaps does this leave us with?• What do we need to take steps to address those gaps - research, resources, leadership, facilitation?	11:15am
6	Meeting Close		11:25am