



How Bishopsgate automated its internal staff processes and external communications in one digital operations platform, keeping its school community safe, informed and productive at all times — even during COVID-induced remote learning.

Bishopsgate School

Bishopsgate School is an independent co-educational preparatory college. Located in Surrey, Bishopsgate caters for children aged 3 - 13, comprising a Lower School (Nursery - Year 4) and Upper School (Years 5 - 8). As a top-performing school, with an emphasis on delivering a broad range of specialist subjects and extra-curricular activities, day-to-day demands on both staff and parents are high.

To improve efficiency and responsiveness, Sarah Allmond — Compliance, HR and Information Manager at Bishopsgate — saw an opportunity to streamline many recurring operational tasks and processes. As a one-man-show, Allmond knew that if she could consolidate and digitise these in one place they'd also be easier to manage on an ongoing basis.

Read on to see how Bishopsgate has applied process automation technology to a range of perpetual exercises — from staff compliance and consent, to parental engagement and COVID-safe protocols — in order to improve operational efficiency and effectiveness today and over the long-term.

Summary of Results

<p>80 STAFF USE CASES</p> <p>Automated through Operoo: From staff onboarding to leave requests.</p>	<p>NO MANUAL CHASING</p> <p>Of staff for missing forms, information, acknowledgements or consents.</p>	<p>380 OF 380</p> <p>"All our parents are onboard with Operoo and love it."</p>	<p>100% AUTOMATION</p> <p>Of all staff processes, requests, forms and workflows.</p>	<p>12-HOURS</p> <p>For all parents to return signed digital consent forms for remote learning.</p>
<p>100% STAFF ADOPTION</p> <p>Staff rave about Operoo and the amount of time the platform saves them.</p>	<p>SIMS INTEGRATION</p> <p>Means medical, emergency, dietary and other data is synced and updated in the student record.</p>	<p>1 SOURCE OF TRUTH</p> <p>For distributing, collecting and monitoring all staff form responses, requests and process completions.</p>	<p>"TRANSFORMATIVE"</p> <p>Change in staff response rates and submission timeframes for all policies and processes.</p>	<p>28 TRIGGER ACTIONS</p> <p>Fully automated in one COVID-safe workflow, keeping the school safe and compliant.</p>



The Challenge

Inefficient staff processes and ineffective parent communications amidst COVID-19

While Allmond said Bishopsgate began assessing Operoo as part of its search for a trip management solution, she quickly realised that the digital operations platform could solve a breadth of challenges facing the school — from staff compliance and consent, to external communications and COVID-safe protocols.

“We started talking with Operoo when we were looking to digitise and streamline the management of our school trips,” said Allmond. “From the outset, we knew we needed a system that was user friendly and integrated with SIMS — our Management Information System [MIS]. Beyond these initial needs, we soon discovered that Operoo also offered us the opportunity to address a breadth of operational processes throughout the school.

“As my role spans compliance as well as HR, I knew we had a chance to increase the efficiency and reliability of our internal communication and documentation processes too. I was constantly chasing staff for information I’d requested and spending significant time attempting to manage and track what I’d received. I knew there had to be a better way.”

Externally, there were two additional issues Bishopsgate and Allmond needed to overcome — one they knew about at the time, and another pandemic-shaped problem that would soon become apparent.

“We’d recently launched a standalone parent communications app,” said Allmond. “However, we soon found it wasn’t up to the task. So, we were looking for a new robust solution to solve our external messaging challenges. The potential to combine these features with internal staff compliance and communications capabilities, in one system, was very appealing.

“*Ultimately, the choice to go with Operoo was made easy by the range of operational tasks it enabled us to streamline in one place. We could deliver the communications experience our parents wanted and improve the efficiency of our internal staff processes.*”

In hindsight, when COVID struck, Allmond added that it was a relief that Operoo offered COVID health-check capabilities out-of-the-box, which could be customised to meet Bishopsgate’s specific needs.

The Solution

Automating internal, parent and COVID-specific processes in one place

Allmond pinpointed a number of Operoo features and functions that underpinned Bishopsgate’s ability to improve and streamline the way it distributed, tracked, chased, collated and acted on its internal, parent and COVID-specific communications and consents.

“When it came to capturing requests for information, we previously used a mix of tools; including Google Forms,” said Allmond. “We quickly found that Operoo offered a number of significant advantages over standalone emailing and form apps.

“Firstly, requesting, collecting and monitoring all responses via a single online platform delivers superior data security and insights.

“*I love the visibility I get with Operoo eForms.*”

“Operoo’s real-time reports and data visualisations offer the ability to slice and dice responses to specific forms, or particular answers within one form type, in real-time as replies roll-in. That’s very valuable to the school.”

Apart from the time saved managing and analysing information received from the Bishopsgate community, Allmond said automating critical aspects of the communications workflow itself — using automated distribution, translation and reminders, along with eForm Templates as well as data-based Smart Groups and Trigger Actions — helped ensure the school, its staff and families obtained and shared information more efficiently too.

“The ability to schedule time-based follow-ups with Operoo’s Automated Reminders is a huge win,” said Allmond.



“ I no longer have to spend time manually chasing staff for missing forms, information acknowledgments or signatures. Operoo does the hounding for me until I've got all the data I need. ”

“When creating subsequent digital forms for related and recurring staff processes, Operoo’s eForm Templates eliminate tedious rework. It’s easy to customise a specific form from the system’s best practice suggestions, then save that customised form as a template for later reuse or modification. Starting from scratch is a thing of the past.

“ Operoo’s Smart Groups also make it far faster to deliver targeted communications and specific forms to certain types of recipients. ”

“I can easily slice and dice staff or pupils into segments based on data within their profiles, eForm responses or Tags. Because Smart Groups are dynamic, staff and students are automatically placed into these segments the moment they match the specified criteria.”

Allmond explained that, beyond the ability to automatically assign staff and students to particular groups for the purpose of messaging and management, she found Operoo’s Trigger Actions function extremely important — especially when COVID-19 struck.

“When the COVID threat became clear, we needed to establish a number of COVID-safe and COVID reporting processes,” said Allmond. “For example, we needed to identify the students who had parents or carers employed as key workers in order to provision onsite staffing.

“Initially, our Deputy Head emailed the parents of our students, asking them to complete a Google Form. He wasn’t aware that Operoo could help here too. I quickly showed him the profound difference between what Google Forms offered and what we could achieve in Operoo. With Operoo, we could automate everything: The Register of Key Workers would update itself, we’d know which students were coming in and when each day. That same day, I set-up and sent out an Operoo eForm to manage the whole process.”

Additionally, the Operoo - SIMS integration meant that Bishopsgate was already using Operoo for first aid and medication management, which proved crucial.

“We were already managing routine medical processes with Operoo, such as reporting sickness and absenteeism for medical appointments,” said Allmond. “This meant that our school community was already familiar with using Operoo in this context and, internally, we knew we could rely on the platform for constructing robust health-related workflows.

“This allowed us to swiftly build-out a comprehensive COVID response and reporting workflow, which automatically initiated based on responses submitted through our standard Operoo Illness Absence Notification form.

“Using Operoo Trigger Actions, we were able to set-up entire alternative sequences of communications, distributed based on responses received.”

For example, if the parent answered ‘yes’ that they, the student or any household members had any COVID-19 symptoms, a swathe of follow-up actions are instantly triggered — from forms requesting that parents agree to get COVID tests for the family and provide the results to the school; emails alerting school leaders and nurse; addition to specific Operoo Smart Groups, which instantly provides access to learning materials that will be available to affected students while they isolate; and so on.

NO MANUAL CHASING

Of staff for missing forms, information, acknowledgements or consents.

1 SOURCE OF TRUTH

For distributing, collecting and monitoring all staff form responses, requests and process completions.

SIMS INTEGRATION

Means medical, emergency, dietary and other data is synced and updated in the student record.

100% AUTOMATION

Of all staff processes, requests, forms and workflows.



The Results

A “transformative” improvement in the speed and completion rate of operational processes

When it came to results, Allmond said that there were a number of outcomes that stood out.

“*Operoo has allowed us to consolidate, digitise and automate all our staff processes in one place*”

said Allmond. “Not only has this significantly reduced the effort required to achieve significantly superior response rates, it’s also been invaluable for keeping staff connected and accountable during remote learning and throughout the pandemic to date.”

Specifically, Allmond recalled making the decision to move an important aspect of Bishopsgate’s performance management process to Operoo.

“About 18 months prior to Operoo, we relaunched the format of our staff appraisals,” said Allmond. “Unfortunately, we had poor uptake and engagement. So, I move it all onto Operoo along with our other staff processes. Our last appraisal was conducted at the half-term just gone. Thanks to Operoo, its Trigger Actions and Automated Reminders, we completed it all on-time with no manual chasing. It’s been transformative!”

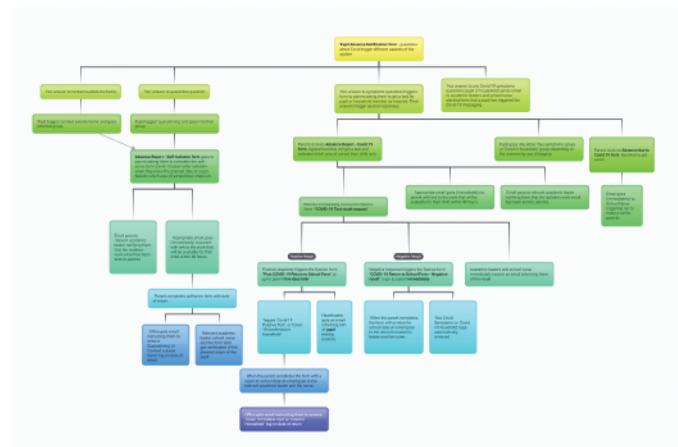
Today, Bishopsgate uses Operoo for a broad range of staff processes, including all event management, risk assessments, bookings, CPD management, onboarding new personnel, signing-off on policies and procedures, staff requests, and lateral flow testing.

“At the moment, all of our staff are required to undergo a rapid COVID test each week; known as lateral flow testing,” said Allmond. “Using Operoo, we’ve been able to seamlessly book, track and manage an otherwise potentially chaotic and stressful recurring task for our school nurse.”

On the subject of managing potentially stressful COVID-induced processes, Allmond used Operoo to achieve two externally facing results of particular note for Bishopsgate.

The first was a fully automated COVID-safe workflow, designed to protect the school community and inform appropriate authorities should COVID symptoms be reported as part of Bishopsgate’s Pupil Absence Notification form. Built in Operoo, the workflow contains four programmatic chains of responses — and 28 individual trigger actions — depending on the different ways in which COVID symptoms were reported in the initial absenteeism form.

An overview diagram of the workflow is pictured below (click to diagram to download it as a separate image file):



“*Not only does this COVID workflow keep staff and families safe, we’re also able to easily analyse and share all COVID-related data captured at the school level*”

said Allmond. “This makes it simple and stress-free to report our daily COVID statistics to the Department For Education. Operoo gives us complete visibility and all the data we need to complete this mandated task quickly and accurately.”



And, although not originally licensed for the purpose, Allmond said that displacing the school's malfunctioning standalone parent communications app with Operoo paid-off big time when COVID hit hard.

"We're now sending all emails, digital consent forms and SMS' via Operoo," said Allmond. "All our parents are onboard with Operoo and love it.

"When COVID cases spiked and we suddenly needed to revert to online teaching again, I was so relieved we'd made the switch to Operoo for our external messaging and that it had been so positively received by our parent community.

"Within hours, we were able to distribute new consent forms, which all parents needed to sign and return so that students could participate in live online learning.

“ Using Operoo, we received all completed forms back in under 12-hours without any manual chasing. It was amazing. ”

The Future "Revolutionising" school trip management and pre-admissions processes

Beyond the chaos of COVID-19, Allmond said that Bishopsgate was keen to restart one operational process and explore automating another for the first time.

"Our Operoo journey first began because of our desire to streamline our school trip management process," said Allmond. "Before COVID took over, we saw how Operoo transformed the management extra-curricular activities; particularly our after school club.

"Parents loved how easy it was to make bookings through Operoo's digital forms, while we had internal visibility into the number of sign-ups per day, age group

and activity type. The live updates of data saved us a monumental amount of time.

"And, we know that the digital Roll Calls, Incident Management and mobile accessibility will hold us in good stead when excursions resume. External providers, working with our after school club, have already told us how easy they are to use."

With annual pre-admissions widely regarded as one of the most resource-intensive recurring processes for schools throughout the UK, Allmond said it represented the next big challenge that Bishopsgate wanted to tackle with Operoo.

“ We're just dipping our toe in the water in terms of how Operoo can bring our pre-admissions into the digital age, but we already know it'll be revolutionary ”

said Allmond. "We've already embedded some of Operoo's Public eForms on our website, where parents of prospective students can make enquiries.

"I'm confident it will significantly reduce our data entry requirements and streamline the whole process. We can't wait to get started in earnest."

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