![Liaison Group — Transforming the health economy]

Specialty Transformation

The 15% Plan

Context – Specialty Transformation

1

Inch wide, mile deep support in a few specialties each year

2

Short term improvement set in longer-term change

3

Gain share approach

- ✓ Multi £m Business Units

- ✓ Purpose, Vision, Leadership Development and Scoreboard

- ✓ Targeted gains of 15%/5%/5% over 3 years

- ✓ Step change in **recurrent** benefits

- ✓ Operational Excellence through grip and demand/capacity planning

- ✓ Strategic shift in line with fit for future and Medium-term plan

- ✓ One plan for specialty towards future operating model

Delivering the Change – One Team, One Plan

Leadership Team Development (could be done by internal OD team)

Team Scoreboard and Data feeds

Operational Excellence Diagnostics

- Demand, Job Planning, Capacity Planning
- Medical/Surgical Productivity through theatres and outpatients
- GIRFT, Model Health and Productivity pack opportunities
- Digital Patient Initiated Follow Up (PIFU)
- Effective Rostering
- Reduction of Variable Pay
- Harnessing retired doctors (Nationally)
- Capturing activity completed
- Review medicines and medical devices spend
- Transactional finance incl: contract management

Strategic Shift (Data and Workshops)

- Left Shift - Reduce Attendances, Admissions, Length of Stay
- Best Practice tariffs and unfunded service analysis
- Cohort management using PLICs data
- Intra relationships – Flow bottlenecks and test ordering analysis e.g. standardising pathways and tests requested
- Advanced roles and broadened job planning beyond Consultants
- Harnessing Digital and Informal Workers

Operational Excellence → **Strategic Shift**

One Plan

Setting the Direction - Target Operating Model

Liaison Group
Transforming the health economy

Why do we need to change?

Case for Change

01

How do we current operate?

Current Operating Model

02

Where do we want to be?

Vision

03

How will we need to operate?

Target Operating Model

04

What changes will we make in which order?

Change Programme

05
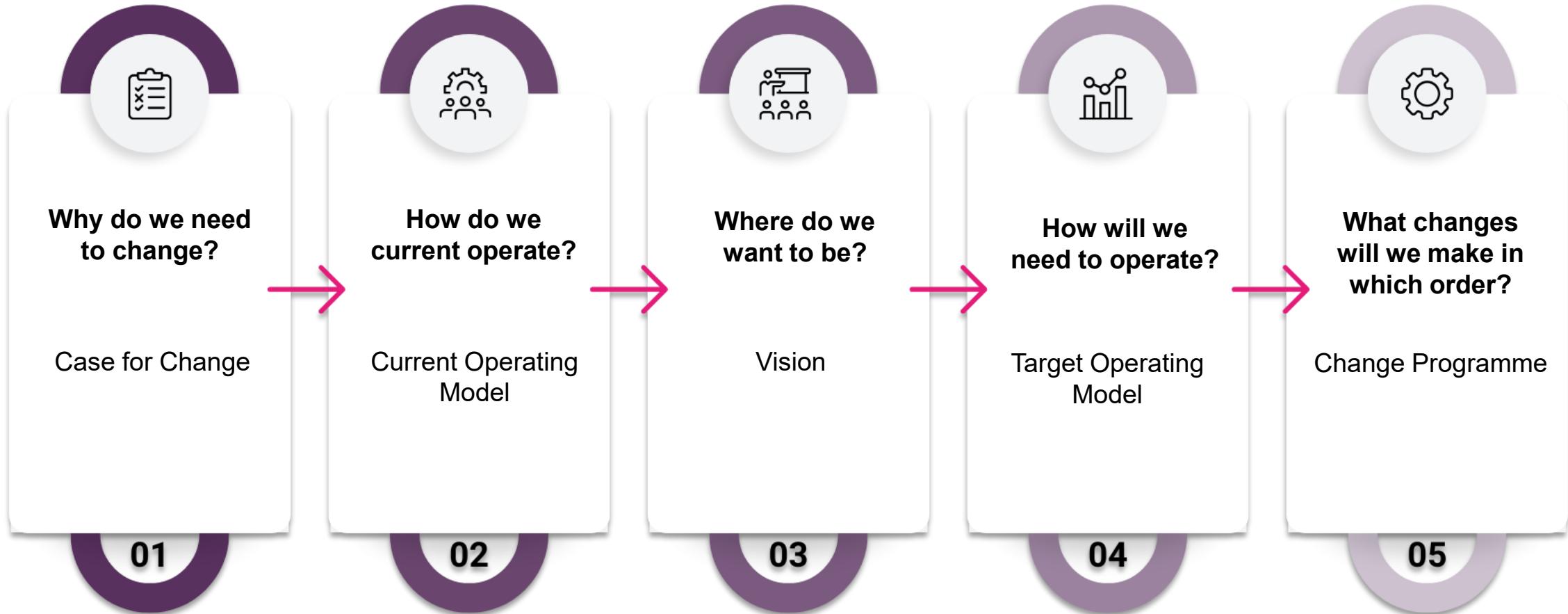
Stages of Delivery

Stage	Mobilisation	Diagnosis and Opportunity	Design and Planning	Implementation and Handover	Post Handover Coaching
Time Period	Month 1	Months 1-3	Months 2-4	Months 3-6	Months 6-12
Deliverables	• Scope finalised • Leadership roles and alignment • Comms and scheduling • Data in place • Scoreboard designed • Steering Group and reporting in place	• Purpose, Vision Scoreboard developed • Commence Team Development • Opportunities identified, quantified and assessed • Opportunity prioritisation • Opportunity scale sign off • Decision to proceed	• Project Initiation Documents/A3s • Data for Improvement • Roles and Responsibilities • Governance • Implementation mobilisation • Continued Team Development	• Implementation • Progress report and handover summary • Next 6-month plan • Project scoreboards • Capability transfer • Completion • Continued Team Development	• Steering group attendance (monthly) • Feedback and Coaching
Output	Ready, willing and able combined team with clarity of expectations	Long list of opportunities assessed for ease of execution and scale of opportunity	Improvement projects defined (use of A3 thinking) and planned with required data builds	Delivery of initial wave of improvement projects with skills transfer for next wave provided to internal leaders	Monthly attendance at steering group and face to face coaching where required

Why Liaison?

Our focus is on true partnership over transactions. With Liaison Group, you can expect:

Collaboration	**Shared Vision**	**True Partnership**	**Commitment to Improving Patient Care**

Each of our 400+ NHS experts has a shared passion – to help create the best NHS for themselves and their loved ones.

That's just one of the reasons we take the risk of offering our services on a savings-contingent arrangement.

THE UK'S **#1** BEST LARGE COMPANY TO WORK FOR 2025 cert.b.co.uk

CONSULTANCY'S **#1** BEST COMPANY TO WORK FOR 2025 cert.b.co.uk

Delivering transformation across four key areas of the NHS

The Challenge

Transformation Pillar

Outcomes Delivered

Success Stories

1

The Challenge
- NHS Financial Deficit
- Grip and control

Transformation Pillar

Financial Recovery

Outcomes Delivered
- **£377.5m NHS savings delivered** in 2024
- **25% uplift** in cost improvement programmes
- **£18m recovered** in 2025 through our VATplus Re-reviews
- **£1.8m CHC Invoice Validation Review savings recovered** for a single ICB
- **£12.5m cost reduction** at one London Foundation Trust since 2022
- Financial recovery for 35 years, working with over **two thirds** of the NHS

Success Stories

"The team are extremely knowledgeable, assurance that all areas have been reviewed and all VAT efficiencies have been maximised. As a result, they identified £325,000."

NHS
Hertfordshire
Partnership University
NHS Foundation Trust

2

The Challenge
- Paybill and Agency overspend
- High WTE
- Productivity

Transformation Pillar

Workforce Productivity and Efficiency

Outcomes Delivered
- Reduces Agency Bill by **15 - 30%**
- Reduces premium pay expenditure by **20% to 25%**
- Increases average bank fill rates to **53%**
- Saving **42 working days** per organisation per year in invoice processing admin
- Increased workforce productivity for **106** NHS organisations, **saving £76m in 2024**.

Success Stories

At East Sussex Healthcare NHS Trust, Agency commission has reduced by up to 40%, with total savings of £1.3m since 2023 using multiple Liaison Workforce solutions.

NHS
East Sussex Healthcare
NHS Trust

Delivering transformation across four key areas of the NHS

The Challenge | Transformation Pillar | Outcomes Delivered | Success Stories

3

The Challenge
- Need for high quality services focused on delivering the right package of individualised care

Transformation Pillar

CHC Optimisation

Outcomes Delivered
- Average efficiencies of **up to 40%** per case load
- Care packages rightsized through clinically-led reviews - **5,332** case reviews and **1,714 MDTs delivered** to date
- Partnering with over **a third of NHS organisations**

Success Stories
"I've found it to be a great experience working with Liaison Care, who clinically reviewed our backlog of CHC cases. I have found them to be knowledgeable, responsive and capable."

NHS Devon

4

The Challenge
- Poor patient flow and productivity
- Waiting lists
- Need for true hospital at home solution
- Increased demand from patients without bed space in hospital

Transformation Pillar

Specialty Transformation

Outcomes Delivered
- **Productivity gains of 15%** in year one, with roadmap for further 5% improvement in years two and three
- Increases clinical capacity by **10% - 50%**
- Reducing unnecessary outpatient appointments by **92%**
- Saving **42,000 bed days** in a year
- Average LOS reduction – 7.4 days

Success Stories
"It has helped us to manage our caseload safely and efficiently and support more patients to recover in their own home. This helps to free up beds for patients who need to receive treatment in hospital."

NHS London North West University Healthcare NHS Trust

Testimonials

"

The work was diligent and analytical in looking at the outpatient department, both in terms of Consultant productivity and relationships to new: follow up ratios and DNAs. However, it is important to emphasise that this work was carried out under the umbrella of a long-term strategy which they devised in order that the work that they have done will be ongoing over time so that the Trust can continue to benefit from the work that they have done.

The team that worked with us was extremely hard working and I have no hesitation in recommending them to you in carrying out similar work.

Mr DK Edmonds
FRCOG, FRANZCOG Clinical Programme
Group Director - Women and Children's
Directorate

NHS
Imperial College Healthcare
NHS Trust

"

I have been very impressed with the benefits we have been able to realise through our theatre operation and those further benefits that we know are achievable.

I have found the use of the Theory of Constraints methodology very exciting and effective. The action plan that we developed was critical to bringing each initiative to life and enabling us to monitor each of them right through to execution. As a result, there have been some significant improvements in the theatre throughput which has had a positive impact on our 18 week target and increased income.

I believe this methodology is an effective way of realising fast paced and sustainable benefits both in terms of efficiencies and throughput.

David James
Director of Operations and Development

NHS
The Robert Jones and Agnes Hunt
Orthopaedic Hospital
NHS Foundation Trust

"

The systems you have put in place clearly had a significant impact on the productivity of theatres and I believe your patience and support have enabled the organisational staff in theatres to sustain and develop the process following your departure.

I would also like to congratulate you on your diplomacy and constructive way in which you approached the consultant staff. Without this there may have been resistance to the changes, they have in fact engaged in the process very productively.

Professor Iain McCall
Medical Director

NHS
The Robert Jones and Agnes Hunt
Orthopaedic Hospital
NHS Foundation Trust

Outpatients at Imperial College Healthcare NHS Foundation Trust

Nationally, the NHS is struggling with rising outpatient waiting lists and delays. Imperial College Healthcare NHS Foundation Trust recognised the need to set a long-term strategy focused on productivity through better alignment of expectations, workforce, and digital systems.

Solution

- **Developed a central model** to map clinics, resources, templates, and their relationship to the commissioned contract.
- **Engaged each specialty** to reset expectations in line with the commissioned contract, standardising by site, specialty, and sub-specialty.
- **Collaborated with Chiefs of Service/Clinical Leads** to agree on standardised timings, clinic frequencies, academic templates, throughput, and resident doctor attendance.
- **Built monitoring tools** to track effectiveness and reliability.
- **Secured leadership sign-off** and removed or repurposed unnecessary clinics.

NHS
Imperial College Healthcare
NHS Trust

Outcomes

- ✓ An **average productivity gain of 22%** across the largest **17 specialties** at the Trust.
- ✓ A **capacity model**, aligned to the commissioner contract using standardised, specialty agreed timings and factoring in the number of Consultants, Academics and Resident doctors expected at each clinic.
- ✓ A **longer-term strategic direction** for Outpatients at the Trust.

This work was delivered by a member of our Board during their time in Consulting, and the proven methodology is now subsumed in Liaison's approach.

Tackling the waiting lists at NNUH using a digital tool

Waiting lists continue to grow in outpatients; patients are waiting longer than ever, not just for surgery, but for outpatients or follow up appointments. Trusts are not able to move beyond their current statuses, with no funding for more digital solutions. Norfolk and Norwich University Hospitals NHS Foundation Trust (NNUH) had a requirement to reduce unnecessary appointments and free up clinical time for those patients needing care the most.

Solution

- **NHSE** funded the first wave of solutions for outpatients, and **HSJ recognised** the work at NNUH as the most ambitious of those projects.
- The project continues to deliver **over and above** any other outpatient digital long-term condition management solution implemented nationally due to its unique structure.
- This solution has **been rolled out across 47 specialties**, giving patients flexibility over their follow-up appointments.
- Instead of routine follow-up appointments being automatically booked, **patients decide** if they would like an appointment and requested it themselves at a convenient date and time.

Outcomes

- ✓ **85,000+ unnecessary appointments avoided**, releasing clinical time for elective recovery
- ✓ **Over 110,000 patients onboarded** (56,000 long-term condition) since go-live (May 2022)
- ✓ **5%+ long term condition management rate** maintained and working towards 8%
- ✓ **Only 7.8%** of those on a long-term condition management pathway have requested a follow-up appointment
- ✓ **69 specialties and 296 active pathways**
- ✓ Average patient satisfaction score of **4.2 out of 5**

Orthopaedics at The Robert Jones and Agnes Hunt Orthopaedic Hospital NHS Foundation Trust

The Robert Jones and Agnes Hunt Orthopaedic Hospital NHS Foundation Trust needed support in addressing major operational and financial issues. The Trust was the West Midlands' worst performer on the 18-week standard, running a 10% deficit on its £60m budget, and facing a potential merger with Shrewsbury and Telford.

Solution

- **Diagnosed constraints** through controlled experimentation to identify process bottlenecks.
- **Rolled out improvements** systematically across subspecialty teams using core performance measures.
- **Validated outcomes** with reviews at 12 months and two years, confirming sustained gains.
- **Delivered impact** by reducing waiting times, improving financial performance, and avoiding merger.
- **Embedded resilience** through robust systems for ongoing performance management and continuous improvement.
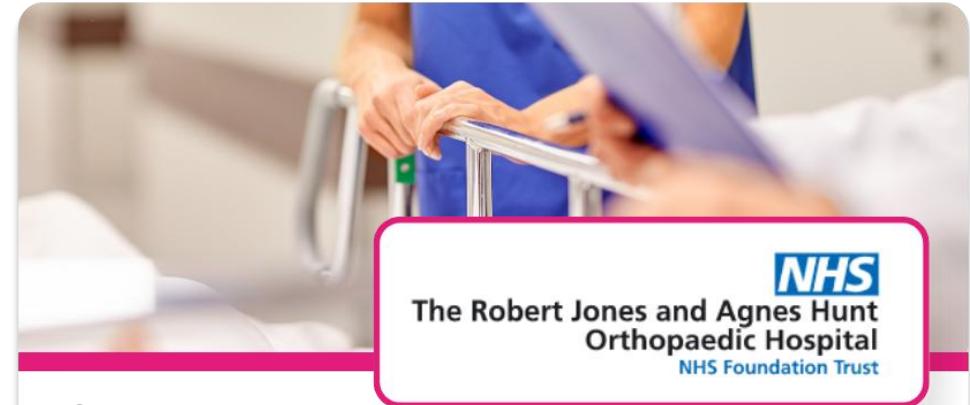
Outcomes

The Trust not only avoided the proposed merger but went on to be awarded **Foundation Trust status**. Theatre productivity improvements **delivered the entire £6m financial gap closure**, with outpatients contributing **an additional £1m**.

At operational level:
- ✓ Session utilisation increased from **78% to over 95%**
- ✓ Cases per list improved **from 1.8 to 2.3**
- ✓ Control measures ensured that longer procedures weren't delayed, with the longest waiting times **reduced by approx. two months**

This work was delivered by a member of our Board during their time in Consulting, and the proven methodology is now subsumed in Liaison's approach.

Performance, Insight and Digital at Sandwell and West Birmingham NHS Trust

Teamwork within and across departments is critical to success. The Team Assessment provided a tool that could be easily deployed and coached to identify gaps in team effectiveness and provide the approaches to narrow the gaps.

Solution

- **Lencioni – 5 Functions of Team:** Sustained work on leadership team development
- **Scoring:** Each section scores out of 9. 3-5 means dysfunction, needs addressing; 6-7 means dysfunction, could be a problem; 8-9 means dysfunction, likely not a problem.
- **Data led:** Specific scoring informed the discussions about the next exercise.
- **Merging Departments:** Incorporated integration of a new department and different leaders.

Outcomes

- ✓ **29% increase** in trust, **60+% increase** in attention to results and **47% increase** in accountability
- ✓ **Half a day per month**
- ✓ **No known dysfunctions within 15 months** and first score of 8
- ✓ **Scores of 8 across all categories** at some point
- ✓ **Scores remained high** after integration of new department and its leaders

Team Effectiveness	Oct-20	ScoreBoard Jan-21	Change	Personal Histories, MBTI, Receiving and Giving Feedback Aug-21	Change	Personal Feedback. Positive, Negative Jan-22	Change	Strategic Playbook May-24	Change	Strategic Playbook including Digital Jan-25	Change
Inattention to Results	4.89	7.11	45%	7.12	46%	7.4	51%	8	64%	7.83	60%
Avoidance of Accountability	5.56	6.44	16%	6.75	21%	7.8	40%	7.6	37%	8.16	47%
Lack of Commitment	6.89	6.89	0	8	16%	7.6	10%	8.2	19%	8	16%
Fear of Conflict	7.11	7.22	2%	7.87	11%	7.8	10%	8.2	15%	7.16	1%
Absence of Trust	5.78	7.44	29%	7.5	30%	8	38%	7.4	28%	7.44	29%

This work was delivered by a member of our Board during their time in the NHS, and the proven methodology now subsumed in Liaison's approach.

Savings, streamlining and visibility achieved with Agency Management Solution implementation

Sussex Community NHS Foundation Trust was looking at how it could make its processes for managing agency staff more efficient and reduce costs. To address this, the Trust, in collaboration with Liaison Workforce, explored how Liaison's TempRE solution could support more efficient management of agency bookings and the associated costs.

Solution

- **Control over workforce management:** Significant savings and improved visibility.
- **User readiness and support:** Comprehensive training, ongoing assistance, and educational resources for all system users.
- **Booking process efficiency:** Centralised management for medical bank and agency staff, streamlining processes and infrastructure.
- **Compliance and governance:** A pre-agreed tiering model delivering increased compliance, a full audit trail, and stronger overall control.

Outcomes

- ✓ Potential savings of **£690,370** through direct engagement in the first 12 months.
- ✓ An **additional £297,890** in potential savings identified for the first 12 months by **reducing agency commission rates**, creating consistent labour rates eradicating agency invoices and limiting invoicing and timesheet errors.
- ✓ **100% of hours booked** for Medical & Dental workers at or under the NHSE rate commission caps.
- ✓ Manual booking processes were consolidated into TempRE, **streamlining operations**.
- ✓ Improved **visibility and control** over temporary staffing expenditures.

Implementing an interoperable Rostering solution at University Hospitals Coventry and Warwickshire

University Hospitals Coventry and Warwickshire (UHCW) had found that their previous supplier couldn't provide true interoperability, which was slowing the process of e-rostering across the organisation.

They sought a solution which was not only fully integrated, but an easy-to-use solution to ensure engagement with its workforce.

Solution

- **NHS At Work** implemented across the Trust.
- **Full support provided:** Liaison Workforce's product development team on hand to ensure the app and platform were set up to the Trust's requirements.
- **Open communication:** Close working relationship developed to share feedback, make improvements and enable a smooth and timely set up and roll-out across the organisation.
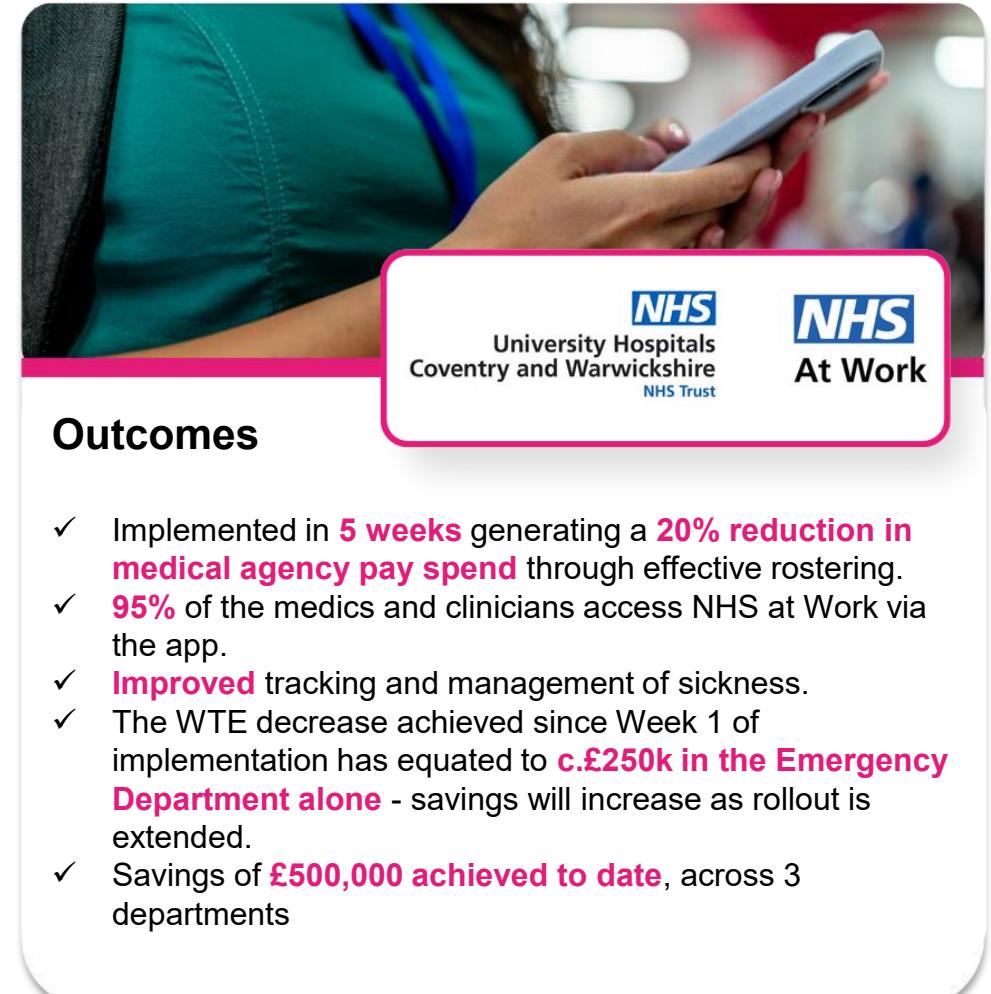
Outcomes

- Implemented in **5 weeks** generating a **20% reduction in medical agency pay spend** through effective rostering.
- **95%** of the medics and clinicians access NHS at Work via the app.
- **Improved** tracking and management of sickness.
- The WTE decrease achieved since Week 1 of implementation has equated to **c.£250k in the Emergency Department alone** - savings will increase as rollout is extended.
- Savings of **£500,000 achieved to date**, across 3 departments

Transforming temporary staffing spend with TempRE Bank

Hull University Teaching Hospitals, the largest employer in East Yorkshire, faced rising demand, funding pressures, and longstanding recruitment challenges that drove high agency spending. Implementing TempRE Bank enabled the Trust to centralise booking management, improve visibility and control, and achieve significant cost efficiencies through streamlined processes, comprehensive training, and stronger compliance.

Solution

- **Control over workforce management:** Significant savings and improved visibility.
- **User readiness and support:** Comprehensive training, ongoing assistance, and educational resources for all system users.
- **Booking process efficiency:** Centralised management for medical bank and agency staff, streamlining processes and infrastructure.
- **Compliance and governance:** A pre-agreed tiering model delivering increased compliance, a full audit trail, and stronger overall control.

NHS Hull University Teaching Hospitals NHS Trust — TempRE®

Outcomes

- ✓ Minimised administrative tasks, reduced invoice errors, and improved forecasting.
- ✓ Enabled detailed tracking of temporary workforce spending with **customised KPI dashboard and analytics**.
- ✓ Achieved **£5.3m in ADE savings since go-live** and a **5.5% reduction in ADE spend** between 2022/23 and 2023/24.
- ✓ Maintained an **overall shift fill rate of 87%** in 2023.
- ✓ Processed **22,000 ADE** and **7,500 Bank timesheets**, totaling over **640,000 hours**.

Historic and ongoing savings achieved at a large London Acute Trust

NHS bodies are expected to complete Partial Exemption (PEX) and Business Activities (BA) adjustments as a requirement from HMRC. Working with their previous advisors, this exercise was only being completed by a large London Acute Trust on a simplified and estimated basis with no approved methodology. This ultimately meant that the Trust were over declaring PEX and were missing out on potential BA savings.

Solution

- By working closely with the Trust to obtain all necessary data and information, Liaison Financial developed an understanding of the **Trust's past and current activities.**
- **A financially beneficial and tailored methodology** for the way in which the Trust conduct their BA and PEX reviews for which we gained **HMRC's approval,** ensured **compliance with current legislation.**
- **Historic savings delivered** in relation to overpaid PEX and previously missed BA, ensuring that **ongoing savings could be achieved** through use of the approved method going forward in future years.
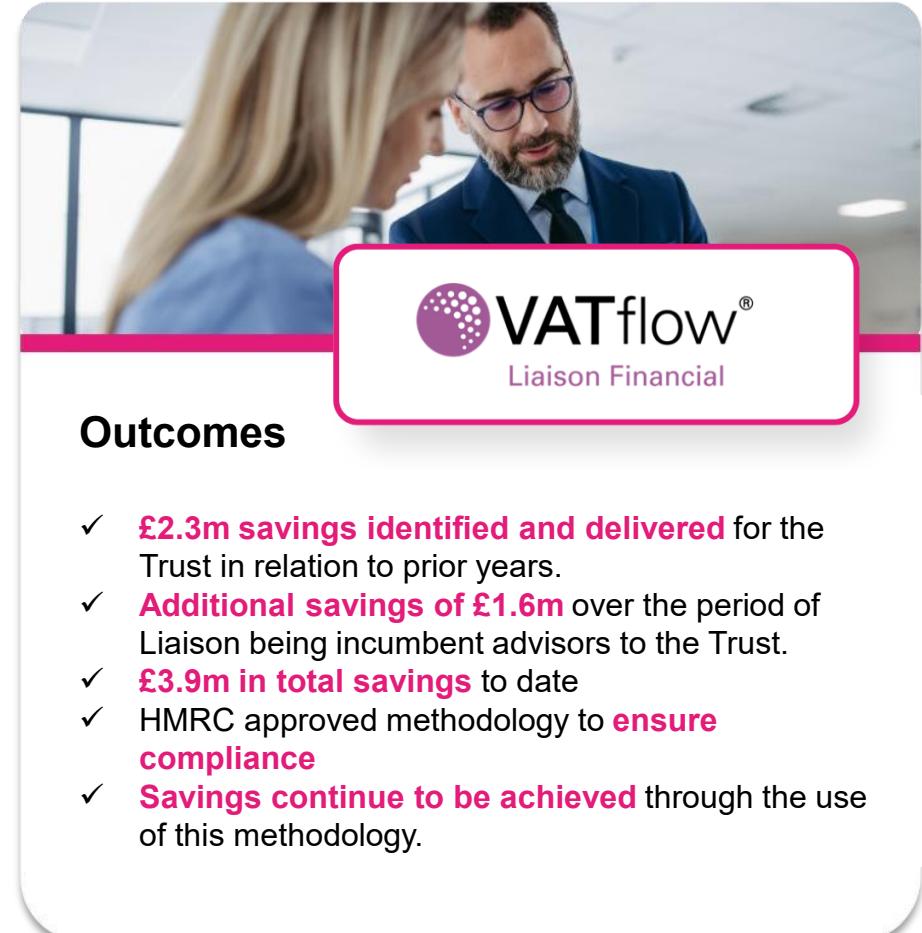
VATflow®
Liaison Financial

Outcomes

- ✓ **£2.3m savings identified and delivered** for the Trust in relation to prior years.
- ✓ **Additional savings of £1.6m** over the period of Liaison being incumbent advisors to the Trust.
- ✓ **£3.9m in total savings** to date
- ✓ HMRC approved methodology to **ensure compliance**
- ✓ **Savings continue to be achieved** through the use of this methodology.

Thank You