Brent	**Housing Scrutiny Committee** 27 March 2019
	Report from the Strategic Director of Community Wellbeing

Customer Relationship Management (CRM) System – Management and Usage

Wards Affected:	All
Key or Non-Key Decision:	Non-key
Open or Part/Fully Exempt: (If exempt, please highlight relevant paragraph of Part 1, Schedule 12A of 1972 Local Government Act)	Open
No. of Appendices:	One: • Appendix 1 - List of remaining CRM deliverables
Background Papers:	N/A
Contact Officer(s): (Name, Title, Contact Details)	Monika Singh, Director of Transformation Tel. 0208 937 1047 Monika.Singh@brent.gov.uk

1.0 Purpose of the Report

1.1 This paper provides an update on the ongoing implementation of the Corporate CRM system (Microsoft Dynamics) in Housing Management.

1.2 As the project is still underway, it outlines what has been delivered to date, and how that is being managed and working, and what remains to be delivered.

1.3 The paper shares some performance information generated by the system, but it should be noted that these are not representative of the whole service as they only represent what is currently being managed in the CRM, and not the full picture.

1.4 Some performance information has been shared in this paper, as requested by the Scrutiny Committee, but it should be noted that the reports currently available are very new and therefore it is too early for trends to be reliably established, and they are still being validated and may well not be configured correctly or the data within them may skewed by the way the system is being used.

1.5 Finally, the paper discusses the current and remaining costs for the programme as well as well as business benefits.

2.0 Recommendation(s)

2.1 That Members of the Housing Scrutiny Committee note the content of this report.

3.0 Detail

3.1 The CRM project, a key part of the overall Housing Management Transformation programme, commenced in November 2017, following the procurement and engagement of the Council's CRM Implementation Partner - Infosys.

3.2 The aims of the project are to address the following challenges with our current environment

3.3 **Cumbersome IT architecture:**

- 18 systems in use across Housing Management alone, costing c£0.3m to maintain and support over and above the corporate ITU recharge
- Fragmented architecture gives rise to a fragmented customer experience
- Limits our digital offer

3.**4** **No 'single views' of customers, properties, blocks etc**

- 18 systems that don't talk to each other, documents in one place, data in another
- Accessing data is time consuming for staff, and not suitable for web self-service for customers
- Handling times are therefore longer than they need to be

3.5 **Functionality gaps - minimal logging of work, work could fall through cracks, no 'corporate memory'**

- Multichannel contact management
- Data for demand management
- Case management from start to finish
- Robust remote working capability

3.6 The vision for the Housing Management programme is to deliver; "***contemporary, digital seamless services that really work for customers, delivered by professionals who are equipped, engaged and efficient***".

3.7 Accordingly, customer satisfaction monitoring, and the customer portal are also key elements of the CRM solution.

3.8 The project is well underway, but not due to complete until July 2019, so this update will focus on progress and benefits to date, and how what has been delivered so far is being managed.

3.9 All of the above will, once fully implemented, completely transform our customers' experience and deliver faster, better more reliable services, and the convenience of a comprehensive and compelling customer portal

4.0 What has been delivered to date (and the benefits associated)

4.1 There have been 3 releases of CRM functionality so far, in March 2018, September 2018, and in January 2019, with one release remaining in July 2019 (see Appendix 1)

Delivered in March 2018

4.2 A CRM **remote working solution for estate LEQ (Local environment quality) inspections** replaced the defunct previous solution (which had been failing for the past 6 years, resulting in the team going back to clipboards and erratic manual collation of data) was implemented. The new solution has proven to be robust, with previous issues around loss of data and double keying eliminated

4.3 **The Housing Management public email address was integrated with CRM**, so that every email from customers, is now raising a work item in CRM, with tracking of whether it has been completed. As a result of all emails being logged, we have for the first time, had data about the volume of emails received by the organisation, and an understanding of what was driving demand (previously it was managed in outlook, where daily figures could be manually counted, but it was practically impossible to count responses sent as this would have to be manually counted from individuals' email accounts. Emails not actioned was a major cause of complaints

4.4 **The CRM customer screen** - a single view of each customer - was created in CRM, with space for all the equalities info (only some held in Northgate previously) access preferences, household info, vulnerability flag, space for any 'Red Flags' etc. The screen provides immediate visibility of tenants and leaseholders, or housing applicants, of their arrears status. This screen is the template for the whole organisation.

4.5 **Single views** of properties, blocks and estates have been created in CRM, and data is gradually flowing into these views as more and more services are enabled

Delivered in September 2018

4.6 **Tenancy Management processes** were automated; decants, evictions, mutual exchanges, as well as a proactive 'tenancy audit' regime which ensures that verification visits are being raised for all tenants at the time due. The rules are different for each type of property scheme, and this approach prevents necessary visits from being missed. The system also routes work to the correct area team, as a team based approach was introduced in July, in line with the new operating model/ Housing Management structure

4.7 **ASB** - crime related casework is now automatically routed to the corporate team for action, and low level ASB of a 'tenancy related nature' is managed by the area teams. This functionality allows Housing officers to tailor and track the interventions necessary for each case as a 'one size fits all' process would not work here

4.8 **Financial Inclusion casework** was also automated, using a similar approach to ASB, as each client's needs vary. The solution implemented here allows both financial outcomes and social ones to be quantified and monitored, so that it is possible to see which interventions bring the most value to customers, and to the organisation

4.9 **Community room management, communal key ordering and residents association grant application processing** functionality was implemented, automating manually intensive and time consuming processes that were previously in operation, and replacing multiple spreadsheets which previously controlled the work. This has not yet been taken on by services as data cleansing needs to be completed

Delivered in January 2019

4.10 **The lettings and sign up processes were automated**. These are complex processes that involve multiple teams working together across the wider housing service. Data is now exchanged automatically between areas and the input of each team in the process which runs from a tenant vacating a property to a new one taking residence. A voids pipeline view was introduced which gives each area visibility of properties where notice has been given, so that each team can prepare for the work ahead. A very impressive feature is the ability to receive a shortlist from the allocations team, and from that automatically set up an open day, invite all the shortlisted applicants and track their interest after the open day, so that a decision can be taken about who to offer the property to. Previously this would have necessitated individual contact with several people before and after the open day.

4.11 The **Income collection process was automated**. This works alongside our escalation policy for collecting overdue rent, which is managed primarily in Northgate for council stock. Our income collection officers now have real time visibility of all arrears 'episodes' for all property schemes, which have reached the stage of 'notice of seeking possession 'stage, and can use the CRM system to do what Northgate doesn't permit (keeps records of emails, legal referrals etc.) and it will show what stage of the escalation processes any account has reached. The system automatically closes cases where the overdue balance has cleared, which doesn't happen in Northgate until the end of each week, and this saves the officers time in opening up work that they don't actually still need to so.

4.12 **Smart Income collection**; The system also has 'smart' views of all 'erratic payers', people whose direct debits have bounced, housing benefits payments due but missing' and so on, so that resources can be diverted from chasing everything, to chasing the highest risk situations. This functionality, had we invested in an off the shelf package would have cost the organisation c£0.05m to procure.

4.13 **Document Management**. The two document management systems previously in use, have now been replaced for a new state of the art corporate solution, which works alongside CRM, and now enables all documents relating to a property, or a customer, or a case to be visible in the CRM system. That means documents, which previously had to be located in a separate system, in now available at the point of service. The system will also make it possible for key documents to be available directly to customers in the new self-service portal, soon to be launched.

4.14 **Customer Satisfaction surveys** in most cases, are now automatically sent to any customer for whom we have an email address, when their case is closed. This not only gives us very powerful data for performance management, and real time insight upon which to plan improvements to all services, but it will also replace the need for us to use external suppliers to provide satisfaction data (at a cost of over £0.01m/ year) by the end of the next financial year

4.15 **Wettons' Powerapp**. By the time of the Scrutiny Committee meeting, a further capability will be live – Wettons' cleaning staff will be using smartphones to indicate what jobs they are working on, and they will take before and after pictures, all of which will be transmitted to the portal. This data will help us to performance manage or contractor by giving us absolute clarity on what has and hasn't been cleaned on any given day. But more importantly as soon as the customer portal is live, customers will know when the cleaner is on their way, has started and finished a clean, and they will be able to rate that clean

5.0 Management and utilisation of CRM

Management of CRM

5.1 The live CRM system is now formally the responsibility of the operational areas, having transitioned from the Housing Transformation team at the end of December 2018, with change management support being provided in the short to medium term by the Service Improvement team (a part of the new Performance, Insight and Improvement Service). The Service Improvement team have also been trained on CRM so that they can provide a basic level of training/ refresher training on the system to all staff, and to new staff as they join.

5.2 This arrangement has been put in place for this financial year to support the operational areas through the introduction of the new system and provides essential capacity for change management activity alongside their day to day activities

5.3 The Housing Transformation team is responsible for the functionality still in development.

5.4 When each release of CRM is implemented, technical training is provided by Infosys as part of the user test phase, and intensive support is provided immediately after go live for a period of 2 weeks. Training documentation is provided as part of the release.

5.5 As part of the user testing phase, some of the staff who attend are designated as ‘super-users’ and ‘change agents’. These staff are responsible for assisting their other colleagues who may not have attended the testing sessions, but who will be using the new system functionality when it goes live.

5.6 Managers, with the support of the Service Improvement team, are now expected to ‘operationalise’ the new system functionality, by tailoring the technical training documents into material that makes sense to their staff, for the work that they actually receive. In some cases, ways of working need to be adapted to sit comfortably with the new system capability.

5.7 This ‘operationalisation’ is a critical activity because we have seen from previous releases that it is important to train staff not only what they need to do to use the new system, but also what they need to stop doing in terms of old, sometimes redundant processing. It also engenders accountability and ownership with the managers, who by the end of this phase will fully understand the system that they expect their staff to use proficiently.

5.8 A great deal of ‘hand holding’ is required for staff, and it is the responsibility of managers to ensure that they keep checking back with their staff and provide further training until it is evident that each staff member is using the system correctly.

5.9 Managers need their own training on how to manage their team’s input from day to day, and how to check the quality of work being undertaken in CRM, and this is being done as part of the operationalisation phase.

5.10 This new approach has been developed based on learnings from the earlier two releases, where it became clear that training alone was insufficient to get the system in use, and that managerial ownership and involvement was absolutely key to ensure that they system is working well for each service. It is hoped that this injection of effort at an early stage of implementation will ensure that the new functionality is being used correctly by staff, and as such generates performance data which can be relied upon.

5.11 Finally, to assist managers, 5 generic reports (ie for all services) have recently been developed which will help managers to oversee their team’ work, and will be made available to managers during operationalisation. These are:

5.11.1 **Caseload management report** - this shows what work was brought forward from the previous period, what new input was received, how much was closed, how much is being carried forward, and what the start date of the oldest outstanding case is.

5.11.2 **Email management report** - this shows emails received, and the status of cases raised from this contact channel, what team they went to and whether they were dealt with on time or not. This will be made available for all channels when they are live

5.11.3 **Demand management report** - this simply demonstrates what customers are contacting us about, and what work our delivery teams are doing. This will be very important for driving channel shift in the future

5.11.4 **Staff performance report** - this shows performance by team member, and for the first time (for many of our services) provides hard data that can be used for performance management in terms of volumes and speed of processing. Very helpful to spot training needs

5.11.5 **Customer Satisfaction Reports** - these show all feedback and ratings received from customers, in real time. Within CRM, the results can be traced back in a few clicks to the actual case

Utilisation of CRM

5.12 To date, the teams who have been trained on CRM fully are as follows:

5.12.1 The 3 Neighbourhood Area teams, who are using the system for tenancy management, including tenancy audits, managing transfers, successions, mutual exchange decants and evictions and so on. They are also using the system for estate inspections (conducting inspections on their phones directly from the estates) , and for handling estate related and ASB casework (tenancy breaches) Adoption levels are variable at this time, and work is underway in the teams to ensure that all functionality that has been delivered is being used

5.12.2 The Contact centre is using the CRM system to triage emails, and to resolve as much as possible at first contact. This is a fully adopted process which is embedded and being managed in a timely fashion. It is fair to say that adoption is however limited to the agents who process emails, but the remaining staff in the contact centre will need to be trained before the telephone channel is enabled in CRM by June, ahead of implementation in July

5.13 We have also had challenges in terms of the timeliness of processing by the receiving departments, who get sent casework work by the contact centre via CRM, because even though training was delivered to all receiving departments about how to pick up emails, this new way of receiving work (via a new and unfamiliar system) and which represents a tiny part of their overall caseload, has taken time to embed, and retraining has had to be delivered in several cases. This is now being overseen by the Heads of Service

5.14 The Housing Support Unit are now triaging post from the mail room using CRM

5.15 The Income collection team have been trained on the CRM and are using it to manage incoming customer requests and contact, and are receiving support to adopt the new functionality to proactively manage rent collection via CRM instead of Northgate.

5.16 The lettings team manager has received intensive training on managing the overall Voids process from end to end, including interfaces with allocations and property services, and the system is being embedded at this time, having been recently delivered in January

5.17 All other areas, notably the 3 Leasehold teams and Property services teams are trained on CRM to receive emails and post, and to view, upload and download documents, but their own services have not yet been implemented so their levels of adoption is best classed as partial.

6.0 Performance and Customer Feedback

6.1 As the system is only partially implemented, the data we have at this time does not provide the full picture.

6.2 For instance:

6.2.1 We can now report for the first time on our email handling performance, but we cannot yet compare it to other channels such as the phone, or the portal, which have not yet been enabled on CRM.

6.2.2 We can see patterns of what drives customer demand, but only demand through the email channel.

6.2.3 We can also report for the first time on 'first contact resolution' but again this is limited to email contact

6.2.4 We have an indicative picture of customer satisfaction, again restricted to what has been implemented to date

6.3 Also, whilst each new functionality is being embedded, the data is initially not reliable, and takes some time to unpick and stabilise. This is true of the customer satisfaction surveys for example. The logic that determines when surveys are sent out is based on the category of the case and how the case is resolved. This is driving a smaller number of satisfaction surveys that we would expect, so we are currently revisiting the logic, and which cases are not generating surveys and why.

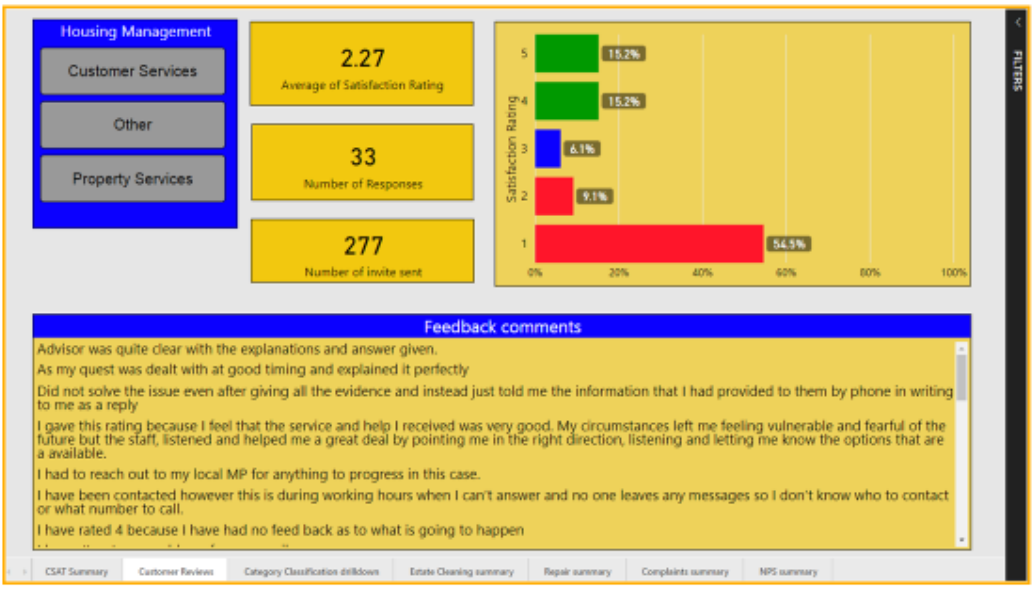
6.4 On the next page, are some examples of the satisfaction data that has been received thus far, but the position we are at with these reports is examining why the level of surveys sent is not as high as we would expect.

6.5 Satisfaction data

Overall satisfaction

6.6 Below are some example Customer Satisfaction reports that track all feedback received via CRM. What the following reports actually say will not be discussed here, mainly because the sample size is not yet viable, and the feedback is only available for some areas, but by the time all services are in, and the right numbers of surveys are going out, this will be a valuable and easy to use management tool for monitoring satisfaction.

Overall satisfaction



6.7 This example above shows the average rating across the service, and the distribution of ratings received. It also shows the comments received for those ratings

6.8 This next report overleaf shows the performance of a single area, in this case estate management. In this case the total cases figure includes a large number of automatically generated inspections, which are not rated by customers, but we would still expect more surveys to be generated than have been. Still the report shows how helpfully the data can be viewed once received.

Estates

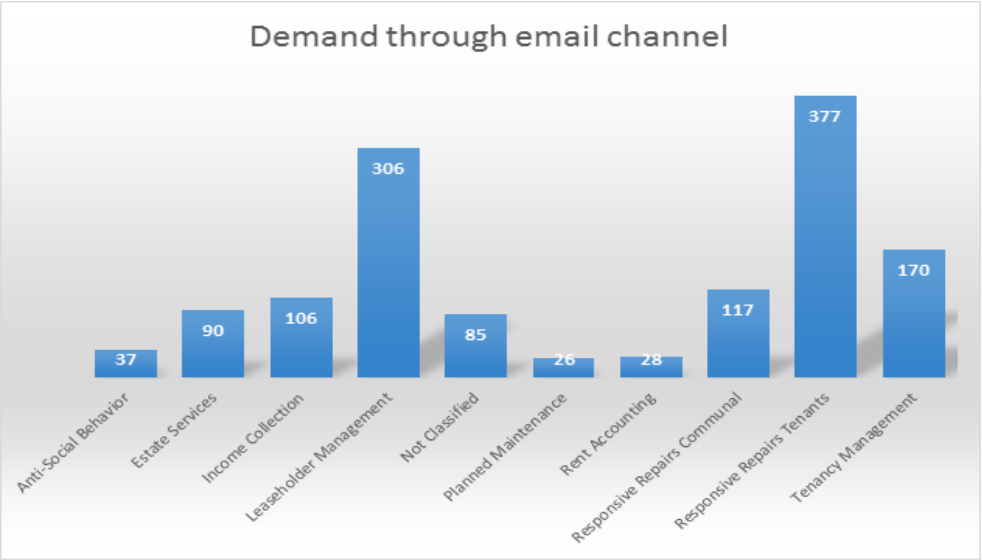
Estates

6.9 It is possible to click on positive or negative buttons, and see the comments associated with each, which makes the analysis of customer feedback far easier than it is possible to assimilate today, and it is possible to filter by customer type, or by ward, or by channel.

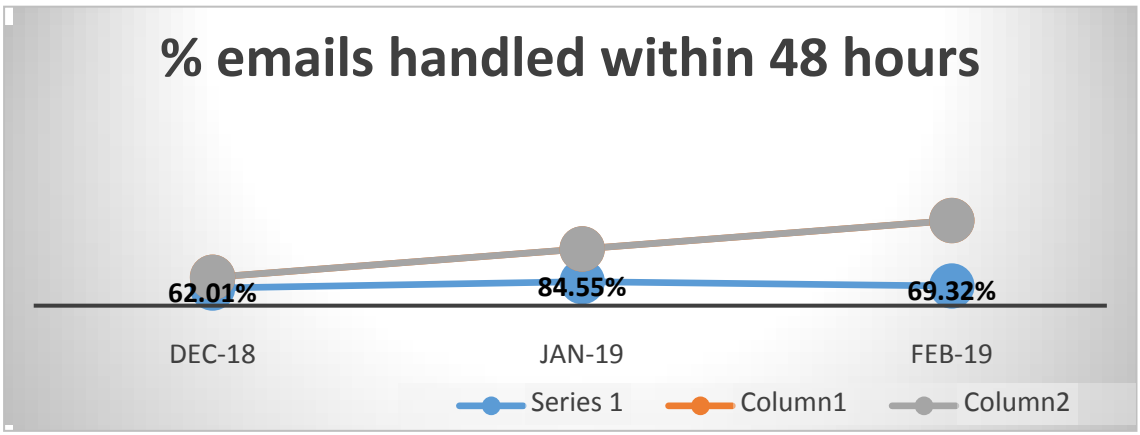
Email data

6.10 We are reasonably confident with the data being received on emails at this time, and the following graphs have been developed from CRM data spanning the last 3 working months.

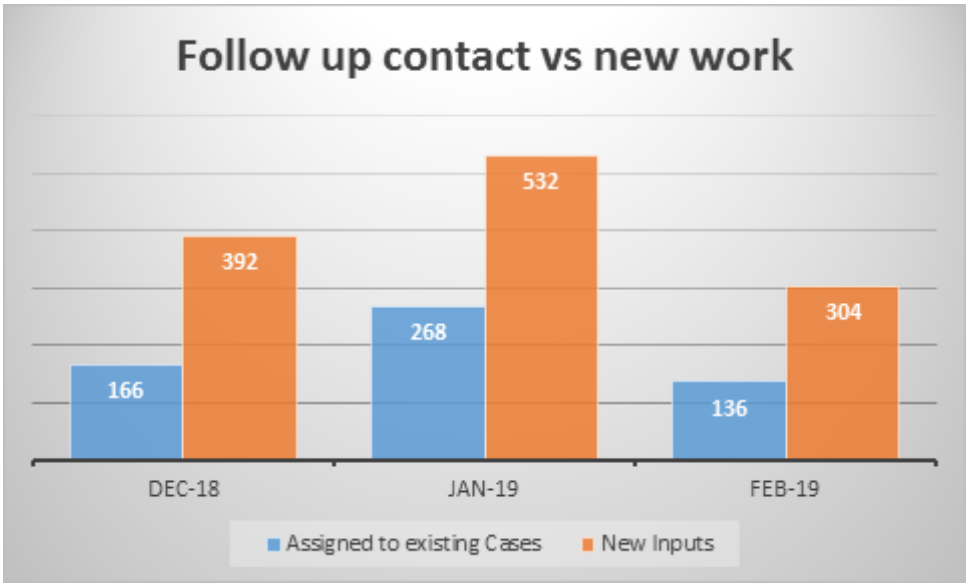
6.11 The first graph shows demand through this channel; precisely what are customers contacting us about? Not surprisingly the greatest amount of work is related to repairs, but the scale of the leaseholder contact is perhaps less anticipated and it will be interesting to see if it also true of telephone demand when enabled on CRM.



6.12 The next graph shows out of all emails received each month, how many were triaged by CRT within the service level of 2 days. The reasons for the variation are down to a number of operational issues, such as priorisation of phone calls, system down time and resource availability of key staff.

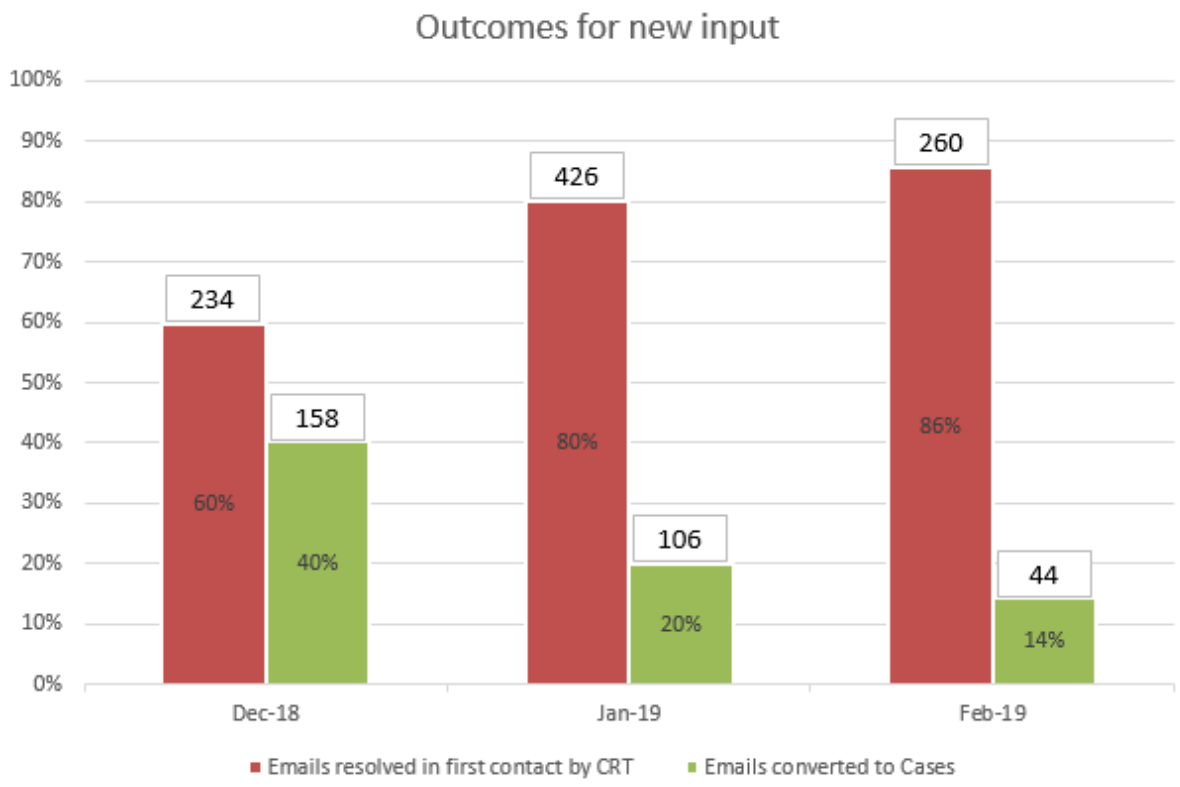


6.13 The next graph shows what proportion of email contact is follow up work as opposed to new work:



6.14 This is not an unusual picture; customers may have been asked for more information, but some customers may well be following up cases not yet finished. The system does record the reason for follow up contact, but as yet this is not available in a report format. This will be progressed as soon as the higher level reports are fully implemented

6.15 The next slide shows, of the new input, how much was resolved at first contact



6.16 This actually paints a rather more positive picture than we would expect of the contact centre at this stage of transformation, and the question that needs to be answered here is why are such a small proportion of emails being passed on to other areas to deal with? Are we genuinely getting so many emails that need little or no processing?

6.17 The data beneath the stats has accordingly been interrogated, to ensure that emails and cases are being recorded correctly, and to ascertain what the emails are actually about.

6.18 The analysis shows that a large proportion of the emails received are in fact spam, out of office messages/ automatic responses to emails we have responded to previously, and general council communications. These emails, which result in a high number of deletions because they are not actually customer contact, need to be excluded from the raw data, even though they take staff time to process, they clearly need to be viewed separately.

6.19 This illustrates that when a data is first available via new reports, it prompts further probing until a level of understanding is reached in terms of what the data is actually telling us.

6.20 This is step that should take place early after go live, and explains why data cannot be relied upon for the first few months.

6.21 The final report presented overleaf has been developed as a helicopter view of our Properties, and how they are distributed over portfolios, and wards, and Brent Connects patches

HMS: Property Report

6.22 This is actually a clickable report that enables the user to drill down by property scheme, or ward, and so on, to obtain information on numbers of properties of a certain type or status. When the system is fully implemented it will be possible to view repairs, complaints etc within this overarching structure.

6.23 In conclusion, the work to establish robust reporting is quite time intensive, as there are several dependencies that need to be checked:

- the report itself working correctly and drawing out all the correct data from the system
- accessing the reports has proven to be a particular issue at Brent via thin client, and we are hoping this will be resolved by the new lap tops that have been issued
- staff using the system as they should, and on
- managers validating the picture that the reports project

6.24 This report validation lifecycle we have found has been caused some unexpected delays in getting the performance data we need up and running.

7.0 CRM and the Wider Housing Service

7.1 The CRM is already in use by the Housing Needs function, as they implemented a customer portal ahead of the new Homelessness Reduction Act of April 2018.

7.2 The Housing Management Lettings team is able to interact swiftly and seamlessly via CRM with the Allocations team in Housing Needs as part of managing the VOIDs process, and the system gives visibility to all areas that are involved in this process.

7.3 As the Housing Management system interfaces with Northgate to retrieve property data, these interfaces can be modified by the wider housing service to deliver their own functionality, such as the I4B team who purchase new properties for their portfolio, and need to set them up and view them in CRM.

7.4 The Private Housing service is set to move from their current case management system Accolaid, to CRM over the next year or so. They will benefit from the functionality already developed by Housing Management, as they can make use of any of the code already developed and use it for their own processes, saving time and effort – they won't have to start from scratch.

7.5 The benefits of a common platform shared by the wider housing service, and indeed by the council even more widely, will be a far greater ability to share and transfer data, automate manual hand-offs between teams and having visibility of a bigger picture, and for customers to 'tell us once' (for example a passport shared with one service, won't have to be produced for another service if it is already recorded as seen, and still valid, on the system).

8.0 Costs and benefits:

Costs

8.1 The budget allocated to CRM system implementation was £0.7m, out of a total Transformation budget of £1.5m.

8.2 We have incurred a delay of 4 months to complete the programme, due primarily to dependencies on 2 external organisations and the speed with which they have been developing critical interfaces from their own systems.

8.3 As a result, the programme is now at the point where it will exceed the original CRM implementation budget by £0.2m.

8.4 The senior management team have considered the option to de-scope potential functionality in order to meet the original estimate, but in order to be true to the spirit of the original programme ambition - the full digitisation of the Housing Management service, and because we believe the functionality delivered to date presents excellent value for money, and we are keen to have the same type of automation across our whole service, the decision has been taken to complete the programme with the additional cost.

8.5 Benefits of the system have been discussed throughout the paper, and in the appendix attached below, which discusses the upcoming functionality.

8.6 In addition to this, we will be in a position to decommission during the next financial year certain other smaller systems that we no longer need to use and in so doing achieve a recurring saving of up to £0.06m per annum.

8.7 The full spend on Transformation, covering staffing and consultancy is as follows:

Housing Management Transformation Budget	**Original Budget**	**17/18 outturn**	**18/19 projected outturn**	**19/20 projected outturn by end July**
Programme budget May 17;				
Initial technical evaluation, strategy and business case	£50,000	£56,000	0	0
Transformation team	£200,000	£192,000	£95,000	0
Business Analysis	£50,000	£24,000	£170,000	0
CRM/ interfaces	£700,000	£480,000	£236,000	£405,000
Additional budget June 18	£500,000			
Total BUDGET vv spend per year	**£1,500,000**	**£752,000**	**£501,000**	**£405,000**
Overall programme summary				
Total budget	£1,500,000			
Total spend	£1,658,000			
Total variance (overspend)	-£158,000			

9.0 Financial Implications

9.1 The target savings from the transformation programme and CRM implementation for 2019/20 is £0.8m. The estimated overspend of £0.2m will create pressure against a balanced budget set for 2019/20. Mitigating actions will need to be identified in consultation with service areas.

9.2 The Director of Transformation post is currently being funded within existing resources in the HRA.

10.0 Legal Implications

10.1 There are no direct legal implications arising from this report. It is the intention of officers that the implementation of the Corporate CRM system will enable the Council to meet and comply with its statutory obligations as a local authority residential landlord in a more efficient manner

Report sign off:

PHIL PORTER
Strategic Director of Community Wellbeing