

Appendix 1 – List of remaining CRM deliverables

Due for delivery in July 2019

- 1.1. **Compliance dashboards** will give a real time view of all compliance activity that our various contractors deliver on our behalf. This covers all the 5 main compliance areas, and all the checks that each area necessitates. All properties and blocks will be checked to see if their compliance certification is up to date, and if anything falls overdue by 1 day, a request is sent automatically to the relevant provider and our own compliance managers, will have a real time view / list of the cases that are overdue. This is a complex initiative as it involved data from multiple contractors to be uploaded into CRM on a regular basis
- 1.2. **The property element of the Voids process** is being automated to support the Voids team in managing the speed and quality of each void process. A series of Voids inspections will feed data automatically to the teams waiting to respond when a property is ready to advertise, ready to view and ready to let
- 1.3. **Contract Management** – all contracts across the Housing Management service will be visible in CRM. Key documents and information about each contractor will be visible, and minutes of contractor meetings, POs and associated invoices can also be tracked. There is space to track contractual performance indicators. For major contractors such as Wates and Wettons, where PIs originate from CRM, the contractor pages will be automatically populated with monthly/ quarterly PIs. For other smaller contractors they can simply be updated.
- 1.4. **Utilities management** – automates the process of meter reading for all our communal utilities supplies and ensures that readings are provided to the relevant supplier, which they are not currently. This will give us tighter management of our spend on utilities.
- 1.5. The **Section 20 process** is being automated to streamline this very challenging process. The system will automatically identify where section 20 is necessary and under what schedule, which drives the process that needs to be followed. Also, introduction of an observations management engine will improve our ability to respond to all observations within statutory timescales, as well as ensuring that observations can be easily shared with residents where appropriate.
- 1.6. All **major works projects, planned programmes, compliance works and major communal repairs** will follow a common construction project process and the system will support project managers through the required steps. For the larger projects the system will request important documents are produced and uploaded, and for smaller projects, it permits a lighter touch approach. This single project approach for all of the is what feeds into the section 20 process, as well as major works invoicing to leaseholders

and it will provide a controlled environment and immediate visibility of the status of any project planned for any financial year, and the leaseholders impacted, at a glance

- 1.7. **Team appointment management;** the CRM system is introducing the concept of team calendars, and pre- agreed slots each day which each team will honour, in line with FTE available. By implementing this, the CXT can set up appointments confident that they will be resourced. It is a major change to the way we work, which is currently sent to individuals and open to the vagaries of sickness and absence. Appointments can be managed on line, so that customers, via the portal can cancel and rebook if a particular time is no longer convenient to them.
- 1.8. The **Repairs** process will be dramatically enhanced; we are working with our repairs contractor to track repairs from start to finish in real time. This will remove the need for the CXT to call Wates when a customer calls us, as currently all the information we need is with the contractor. Wates has agreed to provide us with comprehensive information, and before and after pictures, as well as appointment outcomes so that we can provide it to the CXT, and a subset of that information will be available to customers on the portal; this replaces the ability to fill out a repair form on line, which just gets sent by email to the CXT, but more importantly it puts the information we need, at the point of service delivery
- 1.9. **Surveyors** processes, including inspections, disrepair management and insurance claims will be automated, as well as the quality monitoring of our repairs contractor, approval of invoices, variations and cancellations.
- 1.10. Telephone **system integration with CRM**, will mean that just as emails are now all being logged in CRM, and actioned through to completion of the customer's request, so too will all telephone calls. This is our primary service channel so this is being managed extremely carefully
- 1.11. **Credit card payments** will be enabled in the contact centre, ending some very convoluted and costly manual processes, which were ineffective from a corporate basis, and also very outdated from a customer's perspective
- 1.12. **Leaseholder processes** will be automated in CRM, taking out the manual effort in responding to lease and solicitors' enquiries. Major works invoicing, currently manual will be supported by CRM as far as possible. Complex lease information will be held in CRM, such as head lease info, freeholder and head lease obligations and the ability to record any non-standard clauses in any given lease.
- 1.13. **Customer self-service portal for leaseholders and tenants**, as each process above has been or will be delivered, so too is the corresponding functionality in the new CRM powered self-service portal. This means we will move from a 2 process digital offer for tenants only, to a comprehensive, compelling and contemporary digital offer for all of our customers. This platform will enable the active pursuit of channel shift for

the service.

- 1.14. **A new 'Corporate complaints'** engine is being rolled out across the organisation with the ability in CRM to plan each investigation and track the timely processing of complaints, and to record and track any follow up immediate actions (such as payment of compensation) and longer term corrective actions (such as retraining of staff) . The fact that Complaints, member enquiries, FOIs and SARs are all in CRM is particularly helpful for Housing management, as it completes our single view of a customer
- 1.15. This final delivery is obviously very large, so it has been agreed that the Infosys CRM team will be doubled to ensure it can all be delivered.