crimson®

platform
housing group

SOCIAL HOUSING AND THE CHANGING DIGITAL LANDSCAPE

With pressure to meet political, environmental, customer and cost-saving demands, it's no exaggeration to say that social housing across the country is experiencing unprecedented change.

As sector specialists, Crimson understands the complex challenges that social housing sector is facing and our flexible digital solutions enable UK providers to improve their customer service accountability and boost business efficiency.

CRIMSON

Crimson is a technology and recruitment company with extensive expertise in Microsoft cloud technology and IT consultancy.

Crimson is part of the £1B global Harvey Nash Group and has a reputation built on delivering service solutions that support and meet customer needs.

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Microsoft
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PLATFORM HOUSING GROUP

Platform Housing Group (PHG) owns and manages circa 46,000 homes across the Midlands, with a portfolio that includes social and affordable rent and shared ownership houses. The group is the largest social landlord in the Midlands, and one of the top 15 nationally. It has G1 governance and V1 financial viability ratings from the Regulator of Social Housing and was the second largest housing association builder completing 1,449 new homes in 2019/20.

DIGITAL TRANSFORMATION

Platform Housing Group is a new entity, created in 2018 through the merger of Fortis Living and Waterloo Housing.

This integration provided challenges as well as opportunities. On the technology side, for example, both organisations used different versions of Capita Housing Management Software (HMS).

A single and integrated data processing platform was required. This would include embedded customer service delivery (with a 24/7 self-serve capability) as well as fully aligned data capacity to drive 360° operational efficiency. The project delivery title for this is Platform One.

KEY PLATFORM ONE DELIVERABLES WOULD BE:

Deliver a single version of the truth with the Customer, a migration to one HMS, providing operational continuity. Some removal and consolidation would be required including replacement of the two existing Capita systems and the design and integration of other workflows. By consolidating the two key databases Platform Housing Group would have a single source of truth with customer data across the organisation.

Automation of customer transactions, resulting in more efficient ways of working through the use of business process flow tools and workflow automation as well as engagement and better response for customers. This would also enable the Group to deliver better needs based support for more vulnerable tenants and complex cases.

Comprehensively improved business efficiencies, including asset management and operational/ financial management. Some existing systems (SUN Accounts and Cascade HR) would be retained and interfaced.

Futureproofing and enablement, delivering Dynamics 365 across the business will allow the Group to better take control of system development going forward due to its easy to learn, low code no code configuration capability. Microsoft invest millions to deliver bleeding edge functionality surrounding modern customer engagement, ultimately enabling Platform Housing Group to do more for their colleagues and customers.

CRIMSON & MICROSOFT DYNAMICS

WHY CRIMSON?

Crimson were invited to tender via the OJEU Framework for the Platform Housing Group Platform One project and this was awarded in the final quarter of 2019. The bid was successful due to a number of factors including:

- The provision of an inclusive technical and commercial offer, but independent of locked-in software.

- Crimson's capacity to configure quickly, whilst meeting the pace needs of clients.

- Transparent and consistent ways of working.

- A team with the ability to listen and take personal responsibility to deliver.

- Demonstrated proof of concepts based on pre-set scenarios.

- Being a local (and predominately regional) provider.

- Preferential costing (Crimson is flexible and needs-orientated and is therefore, not locked into premium day rates).

- An alignment of cultural values as well as a strong working relationship with key Platform Housing Group stakeholders throughout the process.
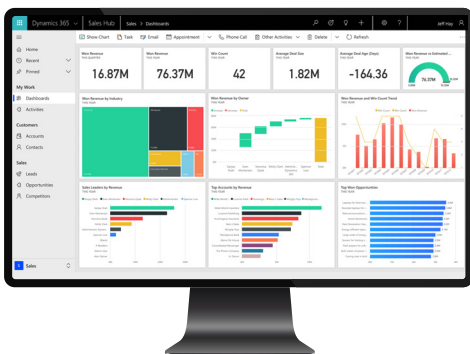
WHY MICROSOFT DYNAMICS 365?

Via interactive technology, social housing customers increasingly expect 24/7 engagement. Offering automated customer-centric response and a highly efficient, in-built support capability, this is where Microsoft Dynamics really can make a difference.

Delivering two significant updates each year, Microsoft continually invests to upscale functionality. Because it's fully scalable, Dynamics also offers optimum price flexibility. And, with embedded artificial intelligence (to track and highlight themes and trends), Dynamics is also future-ready.

Quite simply, for social housing providers, Dynamics 365 brings all the pieces of the jigsaw together.

FOUR STAGES OF DELIVERY

A collaborative integration accross four key phases by Crimson was agreed. They are:

1. SOLUTION HIGH LEVEL DESIGN + CUSTOMER EXPERIENCE PHASE 1

A programme of consultation workshops and a high-level design process delayering the various business applications (customer experience/ housing operations design) into processing and functional/ non-functional streams. This will integrate Microsoft Dynamics into Platform Housing Groups existing customer contact centre (creating a new customer portal) and add in new customer-focused tools and capabilities.

Now underway, Phase 1 is on track for completion by early summer 2020.

As part of Phase 1, with Crimsons iterative ways of working, we are already solution modelling phase 1 which will focus on customer experience, portal and consolidating the two customer services contact centres (Fortis living and Waterloo housing into one Platform contact centre).

2. HOUSING OPERATIONS/INTEGRATION

This involves integrating front-office delivery through a new CRM (housing operations/ property/tenants) and deprecating and consolidating a variety of legacy systems as well as the two Capita HMS systems. Integration is key to this phase to ensure Platform Housing Group can release aspects of functionality with Dynamics 365 in capability drops, whilst keeping the fundamentals of the business running. The integration architecture over time changes, starting with a high level of integration into Capita and then gradually will pair back as Dynamics 365 replaces the functionality and integration no longer becomes a need due to replacement.

3. ASSET MANAGEMENT

Improving and integrating daily and strategic asset management, including planned response and maintenance, compliance (gas and fire regulations), plus depreciation.

4. FINANCIAL

Improving and integrating all financial systems (core processing, debt management, property/ service charges, ledgers and purchase orders, for example). The full project delivery is expected to be completed by mid-2022.

STRATEGIC ENABLER

- Platform One supports Platform Housing Groups IT strategy: self-serve, automation, integrated multi-channel (single timeline), multi-skilling of staff, increase in assets, provision of data for Business Intelligence (BI) use.

- It also facilitates future strategy development through enablement of technical and functional advancements to meet the demands of PHG's progressive organisation.

CUSTOMER FOCUSED

- Platform One provides seamless omni-channel engagement experience for PHG's customers and will provide a variety of ways for them to engage with the business in order to report and track their interactions and transactions.

- It also delivers a consistent service to the customer by the introduction of a 'customer relationship management' (CRM) principles, enabling PHG staff to retrieve records by customer, tenancy, asset from a single source.

- It allows all interactions to be recorded in a single timeline. This will improve the customer and colleague experience in case management by having all relevant information in chronological order.

- It will also give one-contact resolution on straightforward cases to help drive improvements in customer and staff satisfaction.

EFFICIENCY END-TO-END

- Processes currently operate in 'silos' and are efficient in parts, yet inefficient in other areas, especially where hand-offs between teams or departments occur. Platform One will see processes re-engineered to focus on maximising the efficiency across the whole process to ensure customer needs are met expediently and in a consistent manner.

- Platform One will help eradicate inefficiencies of current processes and systems through the introduction of a simpler system and processes, thus reducing 'workarounds' to cater for current inefficiencies.

- As areas of the business become more self-serve and mobile working is rolled out to more users, Platform One will enable staff to be redirected to more productive tasks.

- Platform One simplifies the process of multi-skilling of staff and the ability to manage PHG's increasing asset portfolio.

- Continual reviews of business processes will ensure PHG utilises the PlatformONE solution effectively and maximises the benefits it can provide.

DATA INTEGRITY BY DEFAULT

Platform One will give:

- All users within PHG, including non-housing operational, will have access to same source of data ensuring consistency in reporting and monitoring.

- Improved integrity of data through a common naming convention, defined attributes and consistent data rules.

- A reduction in manual crosschecks through built-in data and business rules backed up by audit and exception reporting.

- The opportunity to bring alongside different types of operational information, opening up 'data science' capabilities which will inform the corporate plans through trend/pattern analysis and predictive capabilities.

AUTOMATION AS A FIRST PRINCIPLE

- Platform One will see the automation of manual processes insofar as possible to ensure 'repeatable' outcomes to actions undertaken in response to customer management.

- It will also facilitate and maintain integration to other systems so that full 'supply chain' automation is achieved, reducing the errors inherent in trading data across disparate systems and with other contractors.

A COST EFFECTIVE BALANCE OF SUPPORT AND AUTONOMY

- Platform One will remove dependency and associated costs with third party suppliers where there is currently integration within legacy systems.

- It will also reduce support costs through being able to develop in-house skills to support and maintain the solution independent of the original solution vendor.

- Speed will increase and cost of development decrease enabling quicker and more cost-effective changes to business requirements.

AVAILABILITY

- Platform One will delivery 24/7/365 availability, minimise downtime, increase automation and drive a huge reduction in manual inputting.

- It will be available on a variety of devices, operating systems and/or browsers, reducing the need (and associated costs) for separate mobile-based solution development.

- It will also be available as both an internal operating management system and as a customer facing toolset, reducing the need (and associated costs) of separate customer solutions.

Diagram highlighting key PlatformONE deliverables

Core Financial controls
- General ledger (SUN Accounts)
- Purchase Orders (iPOS)
- Rent, benefits, service charges
- Purchases, contracts, sales
- Debt Management

1ST PHASE Contact Centre (CRM)
- Customer portal
- Customer mobile app
- First contact resolution
- End-to-end customer journey optimisation
- Customer engagement

FINANCE

CUSTOMER EXPERIENCE

ASSET MANAGEMENT

HOUSING OPERATIONS

Development
- Estate maintenance
- Planned maintenance
- Responsive repairs
- Field workforce management
- Home standards
- Compliance - Gas, H&S

- Estates, neighbourhoods & communities
- Customer 'contract' lifecycle, from lettings to termination
- Supporting customer needs
- Field workforce (HO's)

PROGRESSION

A key part of the delivery from Crimson is providing support for employees as well as customers and guiding them throughout the adoption of this new technology.

To aid this Change & Adoption program, PHG have invested in in-house Transformation Leads for each solution area/phase. Each individual will communicate the Platform One/Dynamics story internally and instill understanding and confidence ensuring the end user community are taken on the journey of the Dynamics 365 story whilst the implementation occurs with video content and communication previews of what's coming and what to expect in terms of change.

To further ensure business accountability and continuity, Crimson has joined the monthly Senior Management Team steering board which allows PHG and Crimson to work together as one to deliver the desired outcomes from the program.

WHAT THEY SAID

Jon Cocker, Chief Information Officer at Platform Housing Group said:

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For us, this is a generational transformation.

The delivery between Crimson and ourselves is now moving on from the initial scoping into a programmed integration, with clear ways of working agreed and adopted.

The design and configuration progress so far has been exciting to see and even in times of uncertainty and disruption, the collaboration between Crimson and our team has been excellent.

Although we still have a long journey ahead of us, we have deep confidence in our delivery partners, together we can navigate this major technological integration and adoption.

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