



Housing Association CHP improves service and perception of residents and other stakeholders calling in, by integrating Keyfax Enquiries and powerful Microsoft Dynamics CRM

CHP is a locally managed and governed charitable housing association, based in Chelmsford, Essex, providing high-quality affordable family homes and apartments to rent and buy. CHP owns approximately 8,500 homes across Essex.

Established in March 2002, CHP has two main aims – to provide excellent services and to increase the supply of affordable homes to those in need.

As one of approximately 2,000 housing associations in the UK, CHP works closely with residents, local authorities, private sector companies, other charitable agencies and public sector bodies to constantly improve the services it provides.

With a Customer Services Advisor (CSA) team of around 20 people looking after the calls that come into the Customer Service Centre (CSC), efficiently managing general queries and queries relating to repairs is crucial. CHP implemented Microsoft Dynamics CRM to extend Keyfax Enquiries software from Omfex Systems.

Working with Caltech IT Limited, CHP integrated Keyfax Enquiries and Microsoft Dynamics CRM to help CHP manage customer information and improve call service.

James Dickman project manager at CHP says “The implementation of Microsoft Dynamics CRM as part of the Keyfax Enquiries project has given us an opportunity to see the huge potential in using Microsoft Dynamics CRM at CHP. It is early days but Microsoft Dynamics CRM is already providing us with additional intelligence on our customers and helping to improve service.”

Business Need

Keyfax intelligent call scripting has been used by CHP for 10 years and is an established IT facilitator for the repairs process. Keyfax scripting provides CSAs with a knowledge base that incorporates expert input from qualified technical and social housing specialists. It gives diagnostic systems for handling all types of enquiries, problems and repairs, consistently and with confidence. CSAs enter key words and search terms within Keyfax, and the intelligent scripts guide the user to and through the most relevant solution.

CHP chose to extend Keyfax to business processes outside the repairs arena. CHP experts across the Housing Directorate including Quality of Life, Resident Involvement, Older Persons and Housing Options teams, defined the processes for Keyfax Enquiries implementation.



The project team identified 20 key success criteria that Microsoft Dynamics CRM integrating with Keyfax Enquiries expected to realise for CHP.

These included embedding CHP's customer service excellence principles giving the right messages consistently, increasing calls dealt with at first point of contact, managing calls that directly resulted in a task, and increasing levels of customer satisfaction of phone calls.

Solution

CHP has a forward thinking ICT team and Microsoft Dynamics CRM really struck a note to bring added business benefits and realise the power of a multi-relationship dynamic database.

Omfax had partnered with Caltech IT Limited, CRM experts and Microsoft Dynamics CRM Silver Partners. Caltech has expertise in working with Microsoft Dynamics CRM as well as a focus on Not for Profit organisations.

Caltech worked with CHP and Omfax to integrate and customise Microsoft Dynamics CRM with Keyfax Enquiries.

CHP retained the familiarity of Keyfax and benefitted from the ease of use of Microsoft Dynamics CRM through Outlook.

Integrating Keyfax and Microsoft Dynamics CRM provided a comprehensive view of properties and residents, whilst ensuring the quality of the call through the scripting, in one easy to use system. CSAs are able to manage and take ownership of calls, as they are empowered using the scripting and the information in CRM.

The data in Microsoft Dynamics CRM has given key insight into customers so that CSAs can see the residents' history which means they can show understanding and a level of familiarity.

When a resident or other caller logs an ASB case for example, the CSA follows the ASB script and that information interacts with Microsoft Dynamics CRM. Microsoft Dynamics CRM then uses workflows to generate tasks and correspondence, and CRM provides a crucial central repository.

Darrell Scott 'Project Analyst (Systems)' at CHP says "The first phase of the CRM project has laid the base foundations for us to build upon. It has provided the ability to record all contact with our 'contacts' - both resident and business. We have been able to produce detailed reports on this communication, allowing us to measure demand and identify areas that could possibly be streamlined."



Darrell continues “The use of CRM through Outlook has made for an easy to use system for CHP’s staff as Outlook is a familiar everyday application.”

Benefits

Optimised planning of staff shifts – Analysing the information in Microsoft Dynamics CRM, CHP identified definite patterns of peak call periods. This has enabled it to reduce wasted staff hours and maximise efficiency.

First point of contact call closure – The CSC is able to manage calls more effectively without lengthy hold periods and without the need to pass the resident to other teams. This has reduced staff expense and optimised the efficiency of all the teams using Microsoft Dynamics CRM. This has empowered the CSAs to give precise answers with the full picture available.

Automation of tasks – Certain scripts will trigger workflows in Microsoft Dynamics CRM that will generate tasks and correspondence.

Ability to gather intelligence – Capturing data during calls, Microsoft Dynamics CRM gives CHP a true reflection of call types and detail to make sound business decisions. Collection of email addresses fits in with CHP’s Digital by Default strategy.

Information on demand – Reports are easily generated

Deeper and broader - Understanding of who is calling and why they are calling to identify common themes and respond to them.

Next steps

Following the success so far, CHP has employed a scripting specialist, and within the next few weeks CHP will have Microsoft Dynamics CRM and scripts in place in all of their customer facing sites, head office, community hub and the city based presence. CHP know who is using the facilities, why they are there and CHP is able to manage these contact points more efficiently and consistently.

CHP is running an integration pilot of Microsoft Dynamics CRM working with Caltech IT Limited. The CHP ICT team are managing contact with all IT contractors, and if successful Microsoft Dynamics CRM will be rolled out to work with many other teams at CHP.

Microsoft Dynamics CRM can provide a simplified IT interface. IT systems are complex by their nature. Microsoft Dynamics CRM has the potential to provide a user friendly solution across the organisation bringing together disparate systems.



Phil Callaghan managing director of Caltech IT Limited stated, "We are indebted to both CHP and Omfax, in helping us to understand Housing Associations requirements, specifically CHP's and working with us to develop a system that is easy to use.

It was at times, a difficult journey for both CHP and Caltech. We had to understand issues specific to the Housing sector and CHP had to understand what Microsoft Dynamics CRM could do. The platform that we have developed is now being used in other Housing Association sites and we continue to develop additional functionality as required.

There is a great deal of potential at CHP for Microsoft Dynamics CRM to provide additional benefits and integration to other systems."