



ENGAGE
EXPECT MORE

Customer First

Why did you buy
your Housing
Management
System?



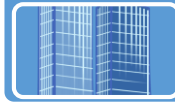
Customer Self-Service?



Customer Communications?



Community Engagement?



BTR/PRS operations?



Customer monetisation?



OR



Back-office operations?

It's not just systems.....

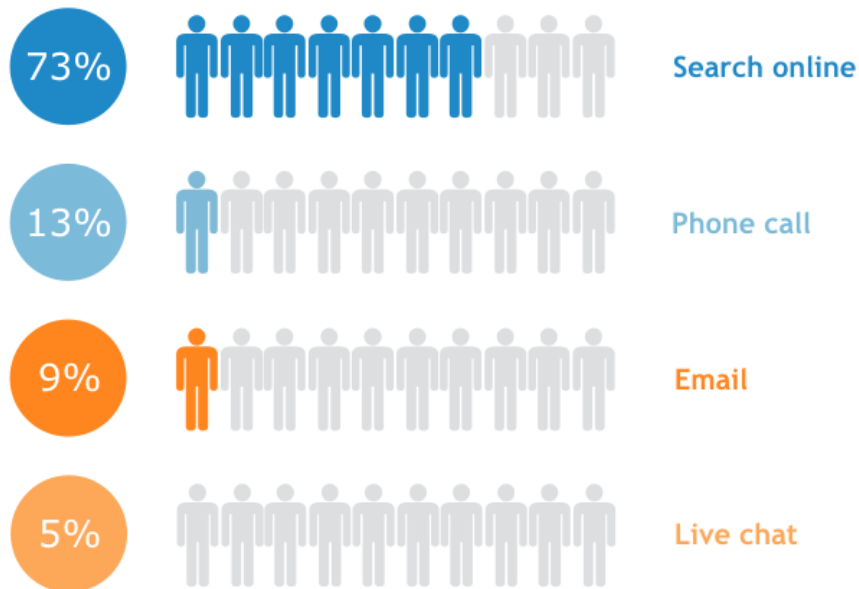
Legacy internal processes and
procedures were designed to support
corporate needs
– not customers

Two important considerations

Over 70% of customers prefer to use a company's website to get answers to their questions rather than use phone or email. (Forrester)

By 2020, the customer will manage 85% of the relationship with an enterprise without interacting with a human. (Gartner)

How people will
initially look for
information



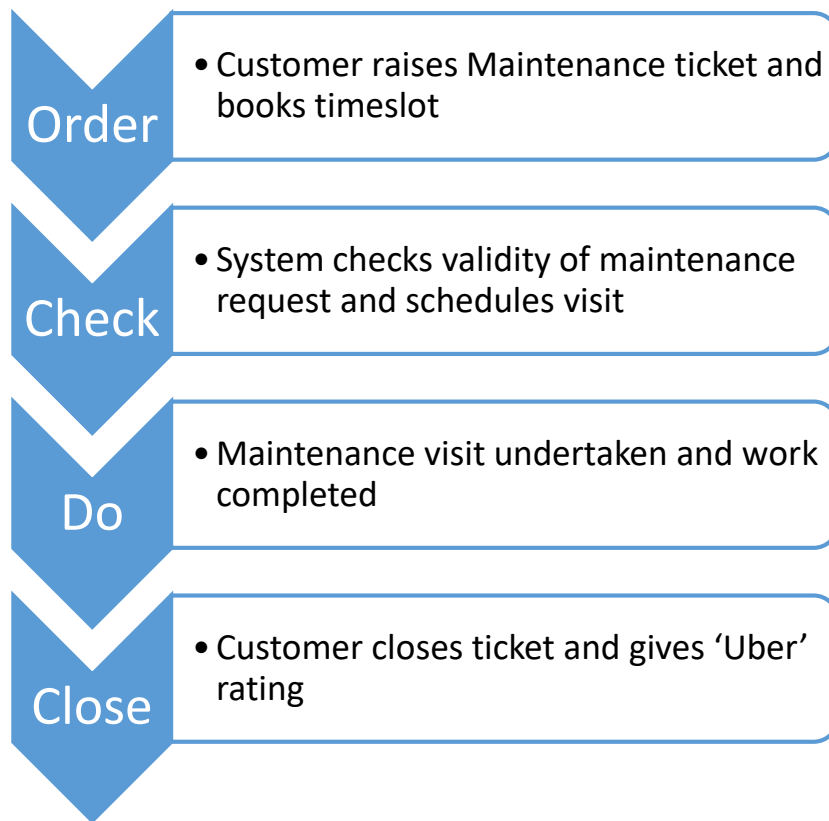
A modern property management system must be built 'customer first'

What your
customer needs
access to



How a process
needs to work. For
example,
maintenance

(As it does in other
sectors)



Positive and
negative contacts.

It takes 12 positive
experiences to make up for
one unresolved negative
experience.

(Understanding Customers, Ruby Newell-
Legner)

Are you using.....

Have you got your
Customer front
end right?

HMS Customer
portal

CRM
application

Bespoke
software

Existing
website

Nothing

Specialist
customer
portal

Faking it ????

Engage specialises in ‘customer first’ design

We talk to real customers and they help us
to design portals that work
– for them

Six Design Rules to get your
customer online

One

Know what
your customer
wants

Customers want one of three things:

- Find something
- Get help
- Say something



Success rates will rely on
understanding what
customers want to do

Two

Make it easy to
find

If customers can't
find what they
want, then it
doesn't exist!

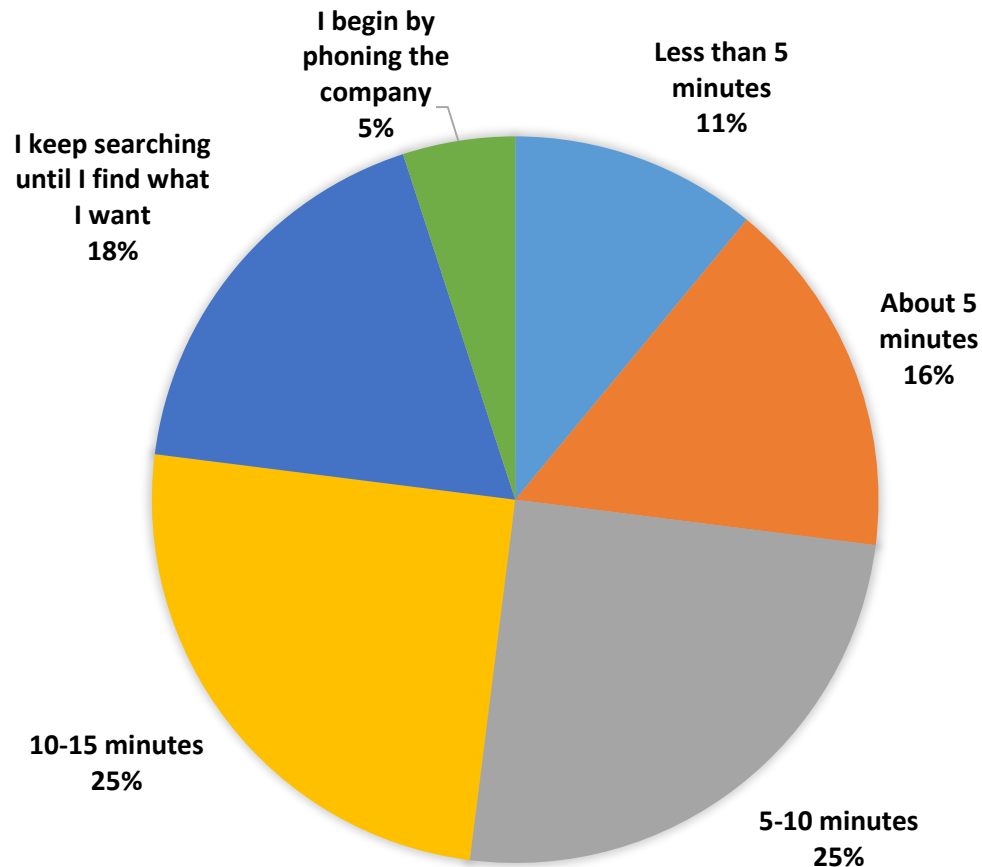
80 percent of
visitors are seeking
20 percent of the
content

Customers' use of a
portal is infrequent.
They don't want to
learn how to use it

Displaying a large
amount of
information will just
overwhelm them

Design for probabilities, not possibilities

How long will
somebody
search for
information?



Three

Provide clear
and readable
content

Enrich your content
with graphics,
diagrams and video

Use plain English
and be to the point

Aim at a reading age of 9

Four

Continuously
improve based
on metrics and
customer
feedback



Five

Make sure your
portal is
responsive and
up to date

Slow web
response times



Increase in use
of other
channels

Monitor performance!

Six

Personalise the
experience

- Welcome the customer with a personalised greeting.

Only display information relevant to them

Make sure the data is real-time

Automatically populate data fields

Transaction
rates indicate
success or
failure

Poorly designed and
implemented
2%

Well designed and
poorly implemented
20%

Well designed and
well implemented
40%

Well designed and
well implemented -
in five years time
80%

Get the design and interface for your
customers right

then

design the back-office systems and
processes to give your customer what
they want

Portals for Residential Management

Resident Portal:
News
Offers
Forum
Neighbourhood
Home
Tasks
Statements
Documents
Maintenance

Investor portal:
Approvals
Reports
Stats

Concierge:
Keys
Parcels
Booking
Maintenance

Services:
Value add

Contractor:
PO's
Quotes
Ticket updates

Portals for Sales, Lettings & Allocations

TAP:
Deposits
Referencing
Contracts
Forms

Pre-sale:
Viewing stats
Offer status

Marketing:
Portal links
Appointments
Offers

Post-sale:
Workflow
Questionnaires
Searches
Conveyancing
Contracts
Viewing stats

Portals for Commercial Management Portals

Office workers:
News
Offers
Forum
Neighbourhood
Office
Maintenance

Investor portal:
Approvals
Reports
Stats

Reception:
Keys
Parcels
Booking
Maintenance

Services:
Value add

Contractor:
PO's
Quotes
Ticket updates

Partner service integrations, eg ClearView, BuzzMove, MoneySupermarket

CRM/ERP Integrations, eg Qube, Dynamics, Orchard, Aareon

Kirkstall Forge – a new neighbourhood

1,200 homes
300,000 ft² offices
100,000 ft² retail
100,000 ft² leisure
Railway station





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Any Questions
or Comments?