

**HOUSING
TECHNOLOGY**
2018 CONFERENCE AND
EXECUTIVE FORUM

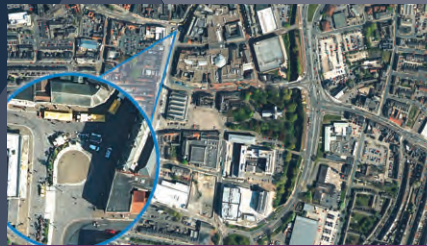
HOUSING TECHNOLOGY
CONFERENCE AND EXECUTIVE FORUM
6-8 MARCH 2018 | Q HOTELS OXFORD BELFRY
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HOUSING TECHNOLOGY™

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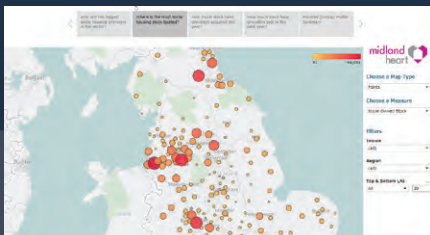
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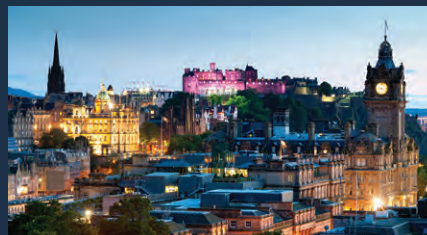
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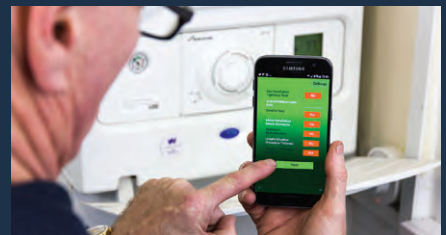
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FORTHCOMING EVENTS

HOUSING TECHNOLOGY CONFERENCE & EXECUTIVE FORUM 2018

6-8 March 2018, Q Hotels' Oxford Belfry, Oxford
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NORTHGATE'S £12 MILLION DEAL 'DOWN UNDER' WITH SA HOUSING

Northgate Public Services has signed a contract worth more than £12 million (\$AUD 21 million) to supply its housing software to SA Housing Trust in Australia.

SA Housing is responsible for all of South Australia's public housing stock comprising 40,000 properties and it funds the provision of homelessness and private rental services to 80,000 low income tenants in the private market.



Whether applying for housing, logging non-urgent repairs or paying rent, SAHT customers can now access services online via their smartphone, tablet or PC, based on Northgate's housing software.

Alice Lawson, managing director of business innovation and professionalism, SA Housing Trust, said, "We selected Northgate Public Services as both

the people and the product speak a language we understand. Our main objective was to give our customers more control over their personal situations and more choice about the ways in which they communicate with us, as well as eradicating the need for our staff to process endless paperwork."

NEC buys Northgate for £475 million

Northgate Public Services has been sold by Cinven Private Equity to NEC Corporation for £475 million. Northgate's customers include around 200 housing providers and 95 per cent of UK local authorities.

NEC's biometric scanning and facial recognition products will be integrated into some of Northgate's core software platforms. NEC's global network will also enable Northgate to provide solutions and services into wider geographies such as North America, Asia Pacific and other regions.

Stephen Callaghan, CEO, Northgate Public Services, said, "Our colleagues and leadership team have worked incredibly hard over the past two years to get the company into great shape

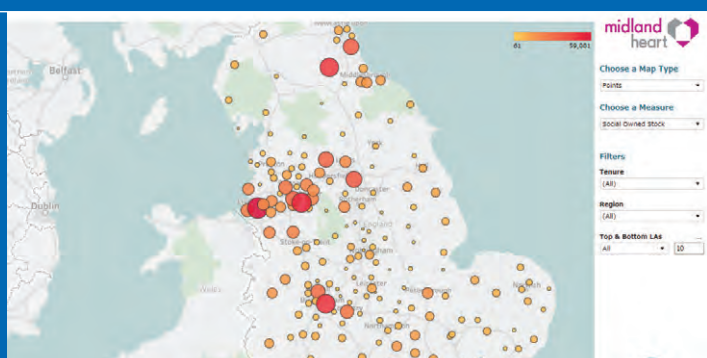
operationally and financially, with the result that Northgate is a highly attractive asset to NEC.

"I'd like to stress that we see this as simply the beginning of our next phase of development. The increased financial strength, technical capability and market access NEC provides will allow us to accelerate our growth plans considerably."

NEC said that Northgate's existing management team will remain in their roles following the acquisition and that it had no plans for any job cuts or redundancies.

Roger Birkinshaw, housing director, Northgate Public Services, said, "The deal with NEC will allow us to combine our expertise to create game-changing innovations for our housing customers. NEC's experience in citizen access and smart cities in particular may enable us to offer an exciting new roadmap for housing technology in the UK and beyond. The acquisition is a tremendous opportunity for us."

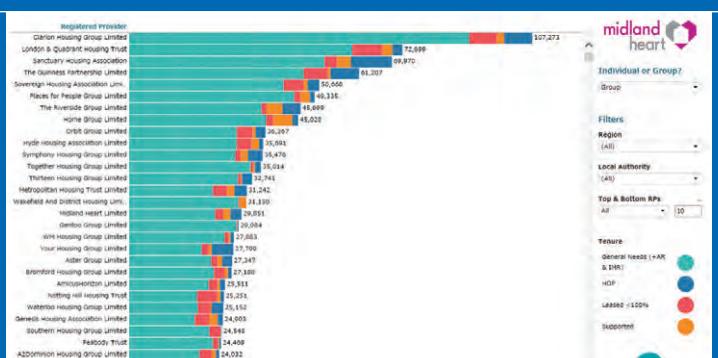
MIDLAND HEART'S HCA DATA VISUALISATION TOOL



Where is the most housing stock located in England?

Midland Heart has updated its free data visualisation tool with the full results from the Homes & Communities Agency's (HCA) statistical data return from October 2017.

The free tool allows any housing provider to make better use of the HCA's annual data release on all the stock held by housing providers in England.



Who are the biggest social housing providers in England?

James Jervis, research and data insight manager, Midland Heart, said, "We developed this tool to help housing providers better understand and use the data from the HCA, and refresh it each year with the most up-to-date information. Following the 2017 release, we have included additional sections to visualise acquisitions and sales, something that is particularly topical in the sector at the moment."

The HCA's statistical data return is an annual online survey completed by all private registered providers of social housing in England and details stock numbers, rents, sales and acquisitions.

To access Midland Heart's tool visit, please see (short URL) tabsoft.co/2LOTIVx (case sensitive).



UNDERPINNING DIGITAL TRANSFORMATION IN TODAY'S HOUSING SECTOR

Cary Duffy, Senior Sales Director for Housing, Exponential-e

Ever since the government published its UK Digital Strategy report last year, housing providers have found themselves increasingly attuned to the digital needs of tenants. In the policy paper, a digital inclusion agenda calls for people in every part of society, irrespective of age, gender, physical ability, ethnicity, health conditions, or socio-economic status, to be granted access to the opportunities of the internet. The warnings are clear for the housing industry; if this isn't achieved, tenants can't take full advantage of the transformational benefits of the digital revolution.

If managed appropriately, the benefits of digital transformation to the tenant experience will be boundless. In order to achieve this, housing providers are now having to broaden the breadth and depth of channels they use to engage tenants. What this means is that they can no longer default to legacy call centres - a medium of communication that can leave tenants feeling frustrated due to the comparative lack of speed, thanks to time spent waiting around on both ends of the call and issues with mobile phone reception. Instead, housing providers need to be online, available and empowering their citizens.

A nationwide framework for housing providers

No one is doubting the vision of the government's UK Digital Strategy, but it's clear that for housing providers their work in this area is never finished. Digital transformation is a continual process, rather than one that can be 'done'. Consequently, by placing the tenant experience at the heart of their operations, housing providers can digitise their services to not only transform their tenants' lives, but also overhaul their own business operations.

The government approach to delivering these objectives focuses primarily on three strands. First of all, it's paramount to ensure that efforts are continued to tackle the deep-rooted causes of digital exclusion; to make the most of the digital

world, everyone needs to enhance their capability.

Secondly, by developing the full range of digital skills that individuals and organisations across the UK need in a digital economy, tenants can find themselves able to up-skill and re-skill throughout their working lives. In turn, this can help ameliorate turbulent financial situations.

Finally, there's a call for committed collaboration between the public, private, and third sectors to tackle the digital skills gap in a manner that's both co-ordinated and coherent. This is where the potential of digital transformation within the housing sector becomes palpably clearer; when adequately harnessed, the technical innovation found in the private sector bolsters the public and third sectors, facilitating better access to digital opportunities for everyone, regardless of background or circumstances.

Cloud collaboration & communication tools

In a sector where tenants can seldom choose their housing provider and success is not always calculated by profits, housing providers can struggle to determine exactly what a good tenant experience is in terms of communications. However, optimising the tenant experience is more important than ever, considering that countless social landlords are increasingly entering competitive new areas of business. One example of this is selling homes on the open market, where competitors have already established entire teams devoted to providing an excellent tenant experience.

This is where the power of digital inclusion becomes so apparent: essentially, landlords must rethink the way that they engage with tenants by harnessing technology to evolve communication channels. Referring back to legacy call centres, one way in which such evolution is taking place is through a distinct shift to social media and

online live chats. These channels enable problems to be solved faster, while also providing a greater sense of familiarity through live communication channels. This is as opposed to the static nature of a phone call, which always requires a certain degree of waiting around and lacks the semblance of a continual service, which the likes of social media embodies so well.

All of this results in happy tenants. Crucially, happy tenants need to contact landlords less, taking up less time and saving money in the process.

Following the Grenfell Tower fire, things will never be the same again, with clear implications for corporate governance, asset management, tenant experience and community cohesion. A core element of this is continually updated knowledge about who lives in these homes and communities. Given the dynamic nature of such communities, this isn't always easy, and so it becomes imperative to harness every point of contact with tenants in order to learn more about them. Crucially, this must go beyond profile characteristics and instead highlight wider aspirations and what they expect from their landlord. Only then does it become possible to tailor and target housing services to have the most effective outcomes.

Ultimately, the networks required to fuel these new forms of communication need to be powerful, reliable and security-conscious. If housing providers don't have these things underpinning them, then digital transformation cannot be achieved. Ultimately, it's all about helping housing providers drive digital initiatives and collaboration with tenants and service providers in a way that is supported by robust security of data and services. By investing in a digital future, housing providers can streamline costs, improve operational efficiency, and concentrate on creating an improved tenant experience.

Cary Duffy is senior sales director for housing at Exponential-e.



INTEGRATION... THE KEY TO INTRODUCING NEW TECHNOLOGIES

Nigel Rees, Joint Managing Director, Aareon UK

The technology revolution that has transformed the operating efficiency and productivity of social housing continues to make a significant difference. However, identifying which technologies will have the most positive impact is harder to predict. Nigel Rees, joint managing director of Aareon, believes that integration holds the key; here's why...

I'm always fascinated by how new technologies morph from testing-board through to polished commercial applications that drive efficiency and value for money. With regard to social housing though, there is clearly no room for 'maybe'; new technologies must be proven and be seen to deliver. And unsurprisingly, not all that glitters is suitable for this market and there needs to be sound processes, capable of evaluating what works and what doesn't.

Vision, attitude & passion

The impressive vision, attitude and passion that HAs bring to the adoption of new technologies is always inspiring. There is now a real appreciation of the importance that digital transformation can play in supporting better ways of working, the importance of engagement with tenants by housing operatives and channel shift to allow tenants to self-serve.

Aimed at driving continuous improvement on all operational fronts, there are new technologies that could either transform working practices or become costly, resource-heavy 'white elephants'. From artificial intelligence (AI) to agile apps and voice systems through to machine learning, big data analytics, frictionless computing, sensor technology and much more, there is a myriad of innovative new technologies and ideas which could play a significant role in supporting housing operations. The challenge is to discover which

of these could eventually drive VFM, operational efficiency or boost customer care the most.

Well, quite apart from what these innovations offer in their own right, the key is to understand and evaluate how they could work as part of a coherent, integrated system. Thus, before one can reap the full potential on offer, all new technologies have to 'make the grade' in terms of demonstrably delivering real and reliable benefits as an integral part of the housing provider's overall technology estate. In reality, their introduction has to be scheduled as part of an iterative, intelligent and cohesive change management process that is closely integrated with the other evolutionary technologies that are already in use. Not all new technologies will be able to make this leap and prove to be effective as part of a joined-up system.

Housing providers need this integrated clarity on the benefits that each technology can provide to ensure that the focus is on both service and on realising a return on investment. Collaboration between providers, to share good integration ideas, will also reduce the need for bespoke and/or customised solutions. It will also accelerate delivery and enable the faster adoption of new technologies. Trust in the 'partnership' between housing associations and the technology providers is essential too.

Once tried and tested, as part of a highly integrated proof of concept (PoC), the new ideas and technologies can be piloted before iteratively deploying them as a full part of the housing provider's systems. Naturally, while cost is always a major factor, integrating incoming technologies with other evolving areas of

development will prove their worth and value quickly in real terms.

So which areas of new technology are currently making the grade and driving the most effective change?

Well, end-to-end process integration with the API to allow digital applications to collaboratively share data where it's needed most is one important area. The HA can then jointly add the latest technology to drive towards digital leadership and the further automation of streamlined processes.

Mobile and 'mobilised' working is another key area. While this is where social housing technology started, it is still one of the areas where new technology drives innovation. Through operatives using intelligent data in the field, through ever more capable apps, housing providers can drive even greater efficiencies. With the increasingly integrated 360-degree data on their devices, these operatives are becoming more and more productive, while being unconstrained by location or time. They will increasingly be empowered to perform numerous tasks that previously required multiple specialists. So through clever big data integration, operatives from all departments can gain a single view of a tenant's needs and history, from responsive repairs and optimal boiler replacement times through to estate management events and broader care issues.

Self-service apps and portals are another field that is evolving rapidly. Easy-to-access and intuitive, these systems enable end-customers to communicate through the digital channels that are now part of their own landscape, alleviating the pressure on customer-facing resources. What were once simple

INTEGRATION... THE KEY TO INTRODUCING NEW TECHNOLOGIES

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online solutions for checking rental agreements and balances are now offering an increasingly full-featured and sophisticated range of customer services and opportunities. These range from repairs booking and advice on universal credit to moving services and content applicable to whatever stage of life customers find themselves at, be that jobs, support, care or health. By encouraging repeatable self-service solutions, the 'cost-to-serve' reduces significantly. This enables investment to be redirected into more accommodation while also ensuring those less fortunate and vulnerable can access greater direct contact and support.

Ultimately, the data generated from tenant self-service systems could be extended to provide updated information on asset condition and, in the not too distant future, by using internet of things (IoT) sensors this data could provide an early warning on specific assets, such as boilers. It could also flag up a change in the overall condition of the property and even the

health and care needs of the tenants themselves.

A greater focus on end-to-end processes will also support the sharing of best-practices, therein delivering improved outcomes, with the full extent of digitisation reducing intervention to apply 'single or zero touch solutions'. Intuitive user interfaces are another potentially huge step forwards, negating the need to log in and out of multiple systems, or the need for extensive training just to navigate through systems. The main consideration here is how far each organisation is prepared to go in reducing silos and choosing streamlined 'friction-free' working practices. However, all this supports the even wider adoption of cloud solutions and services for the fast, scalable and affordable delivery of high value, app-led technology services.

We are also seeing a growing interest in integrating voice, social media, video and other media to speed up the interaction, capture and sharing of data or expertise, thereby removing

the mystique and ensuring a practical application of the widely-discussed 'AI' for automated housing assistance. Visualisation is another technology in play, much tipped to help locate where staff are spending their time and display information in the easily digestible and relevant form that Google has made part of our everyday consumer lives.

So by introducing and supporting new technologies that successfully integrate with and support the ongoing digital evolution and development, housing providers can continuously drive greater value for money, operational efficiency and customer care. The quality and analysis of the data gathered is raised and ongoing business intelligence improves too. Most importantly, it frees up resources that can be diverted to those in the greatest need. Any integrated technology that helps to unlock that benefit can certainly be deemed to have 'made the grade' in the social housing technology sector.

Nigel Rees is joint managing director of Aareon UK.



AAREON'S NEW SOUTHAMPTON OFFICE

Aareon has opened a new office in Southampton Science Park, making it one of three Aareon UK offices and cementing its merger with 1st Touch.

Peter Birkett, CEO, The University of Southampton Science Park, said, "1st Touch originally came to the innovation centre at the Science Park in 2008. Since then, it has been very pleasing to see the company's significant growth through to its recent merger with Aareon."

Cairn Housing's PIMSS asset management

Cairn Housing Association has implemented PIMSS Data Systems' asset management software to manage its portfolio of properties across Scotland.

The housing provider now has a single view of its housing stock from a central database which offers the ability to manage risk, compliance and auditing. Cairn's team can now work seamlessly between the organisation's asset management and CRM

applications thanks to the development of a dashboard link by PIMSS that allows users to navigate to properties between the two systems at the click of a button. The development is extensible so that when other web-based systems are implemented, links to the new systems can be created with minimal effort.

Mark Brown, investment programme manager, Cairn Housing Association, said,

"We now have all of our asset management data in one place in a system that we trust. Having a very geographically-dispersed asset base means that our management challenges are complex but the PIMSS system handles our requirements smoothly and it's very intuitive to use. This is vital because we have a diverse range of users across the organisation, from senior managers and customer service advisors through to our property management team."



INTERVIEW

– OPTIVO'S IT PLANS

Jane Porter (L), Chief Operating Officer, Jeanette Alfano, Director of Technology, Optivo and George Grant (R) of Housing Technology

Following the merger last year of AmicusHorizon and Viridian Housing to form Optivo, Housing Technology interviewed Jeanette Alfano, director of technology, and Jane Porter, chief operating officer, about Optivo's IT plans.

How does the merger affect your IT infrastructure?

Jeanette Alfano: It dramatically affects it. Two separate infrastructures, one infrastructure sitting on-premise in a datacentre and one sitting in the cloud so there were important decisions to be made on how to move forward, and what was best for the future of Optivo.

Jane Porter: Those decisions were made early in the process and that enabled us to get started, which is why we're quite a long way down the roll-out of CRM and moving to a single housing management system. We really wanted to think about customer service and the customer journey; keeping our eyes on the end goal has made it easier to make decisions, thus enabling us to get to where we want to be faster.

How did you decide which technologies to keep, discard or mothball?

Alfano: Deciding about the applications was the easiest part. We looked at which were in use at both sites, which ones were approaching the end of life, were out of support, had high maintenance costs, the relative skill base in the organisation around the individual applications and what the roadmap looked like for those applications still in support to see whether it all fitted with our business future.

The infrastructure was slightly more difficult because there was a big push for cloud-based services. But two years ago at AmicusHorizon we did some work looking at the cost of cloud computing and found that our legacy applications would have struggled in the cloud so we would still have had to have an on-premise presence. We decided that it would therefore be best for Optivo if we brought it all on-premise.

Why did the merger take place between AmicusHorizon and Viridian?

Porter: We merged because we both had similar kinds of cultures and passion for delivering brilliant customer service, but it also generated huge capacity for us to build more homes.

What have been the IT changes so far?

Alfano: We started to move to an on-premise solution for all of our servers and our target was to have everyone in Optivo using a single desktop by August 2017, which we achieved. The real driver for this was that we wanted CRM across the whole business to help the organisation come together. Our approach has been unique in that we have done all that without merging the two housing management systems; we've used our Microsoft Dynamics platform and our integration layer to service both our customer portal and our mobile applications. We further developed the integration layer and we now have Dynamics sitting on the top of Universal Housing and Orchard Housing.

What does Optivo's technology look like now?

Alfano: At the moment, it's a bit of a jumble but we're beginning to pull it all together. We've some ambitious targets, and CRM on a single desktop was our first one. At the moment, we are making sure that all of our applications reside on the on-premise infrastructure. There are still a couple in the cloud, but that is the best place for them. By March 2018, we will have a single Orchard housing management system and a single financial platform for the business.

From an IT perspective, what have been the advantages and disadvantages of the merger?

Alfano: In terms of technology, when we put the business case together for the merger, the opportunity to achieve significant savings across the organisation due to bringing the two infrastructures together was recognised. In terms of advantages, we expect to see savings in the cost of the infrastructure

and also the applications in the longer term because, although as a big organisation we are paying more licence costs for our housing management system, the benefits of having everyone on a single system that provides them with all of the information they need at their fingertips will mean their productivity goes up. The technology is absolutely enabling the merger.

Porter: It's a better user experience overall and we are delivering consistency across the business; it's important that everybody is on the same system. By using the applications that we've developed and the processes that we have, it means everything is consistent at the front end which helps us collect and maintain good data. So the user experience is really good and residents see the benefits as everybody across the business has the information they need to do the job well and deliver a great service.

What role will IT have in your plans to build the 1500 new homes every year?

Porter: We already have capacity to build those, it's about how we build more and how we deliver efficiency, and IT is a big part of that because it helps us improve productivity, streamline processes and deliver services right first time. And technology, whether that's CRM, the apps, our digital platforms or our iPads out in the field, helps us deliver that service. Our customer satisfaction is extraordinarily high and that's because we have what we need to deliver the service.

How is the relationship between business and IT?

Porter: It's fantastic. One of the things that helped us get to where we are is that we had a technology steering group and the new business has something similar, that's not chaired by technology but by somebody in the business. That makes a big difference because it makes sure that technology is integral in the business.

Housing Technology would like to thank Optivo's Jeanette Alfano (director of technology) and Jane Porter (chief operating officer) for taking part in this interview.

SLH cuts arrears with Orchard Income Analytics



Following Orchard's launch of Income Analytics at its customer conference in November 2017, South Liverpool Homes is now using the software to transform how they manage their income and arrears.

Income Analytics has been designed to use the latest analytical techniques to combat the growing number of arrears cases resulting from universal credit and welfare reform. Orchard's software was developed in partnership with Coast and Country Housing, First Ark, Livin Housing and Phoenix Community Housing.

Ian Cresswell, director of risk and technology, South Liverpool Homes, said, "With the continued roll out of universal credit and further economic pressure on tenants' finances, it's increasingly important that we can predict those who are likely to fall into rent arrears.

"Orchard's Income Analytics platform is a truly integrated, mobile-ready solution that enables our staff to manage customers more effectively while

reducing the time taken on individual rent arrears cases. It is completely aligned to our 'digital now' strategy and will help to minimise the impact of rent arrears on everything else that we are trying to achieve."



Orchard helps Shoreline realign its chart of accounts

As part of its merger with Boston Mayflower, Shoreline Housing Partnership asked Orchard to review how its existing OpenAccounts software could be used within the newly-merged organisation.

Orchard has been tasked with identifying areas for improvement that will help Shoreline in the use of its OpenAccounts software deployment, with a particular focus on implementing a new chart of accounts and the formation of a new company. The project includes reviews of all the operational modules in use as

well as those available but not currently being used.

Orchard reported that with Shoreline's existing 12-year old chart of accounts, financial reporting and processing is being hindered by the way in which it was initially set up; it is running out of codes, the use of analysis codes is unknown, as is the use of hierarchies, plus the Project Ledger is under-utilised and not being used for its intended purpose.

Orchard wins OpenAccounts award

For the 11th consecutive year, Orchard has won the 'OpenAccounts Best Business Partner of the Year' award from Advanced, the result of a long, successful relationship between the two companies.

Orchard said that it had continually striven to enhance the OpenAccounts solution through working parties, user groups and discussions, and feeding back recommendations from those activities to Advanced to create future product roadmaps for housing providers.

ADACTUS AUTOMATES ARREARS WITH RENTSENSE

Having been using Mobysoft's RentSense software for its income collection processes since 2012, Adactus Housing has recently been working with Mobysoft to automate their rent arrears' case management processes in order to remove further cases from its income officers' inboxes.

Mike Murphy, head of income and leasehold services, Adactus Housing Group, said, "We are a development organisation and very focused on building, with almost 400 new properties scheduled to be built by the end of 2018. We are therefore always looking at how we can further improve things and deliver efficiencies, so we very rarely leave things unchanged and always look to work in a smarter, more streamlined manner.

"There is also the challenge of universal credit. By March 2018, every Adactus housing officer will have properties in fully-UC areas, and we've already found that UC cases typically take three times longer to manage than 'normal' arrears cases."

As the project was scoped out, Mobysoft worked with Adactus to review its processes, with the aim of the automated solution to remove more cases and free up more time for the income officers. RentSense would use its predictive analytics to forecast if tenants would pay their rent that week. If it was predicted that the tenant would not pay, and that would breach

their agreement, then RentSense would move that tenant automatically along the process to the next stage. RentSense would then communicate the new stage to Adactus' housing management system.

Murphy said, "The predictive nature of the automation gives us information about our true levels of arrears, enables us to focus on money outstanding to the organisation, and it reduces the need to look at some cases because the system automates them."

The RentSense auto-escalation processes synchronise with Adactus' other systems as a file gets uploaded into their housing management system, enabling them to batch print letters rather than on an ad-hoc basis as well as enabling automated calls and texts to tenants.

Murphy said, "RentSense, coupled with the auto escalation, is helping us maintain our performance. Our arrears are currently 1.76 per cent, in spite of universal credit, and we've freed up the equivalent of two members of staff.

"It is not unusual to get to the notice of seeking possession (NOSP) stage and then a tenant pays. If the arrears are paid off, tenants go back to the start of the process, and this really saves staff a lot of time."



USING TECHNOLOGY TO COMBAT RENT REDUCTIONS

Ian Smith, Financial Director and General Manager, Invu

With housing providers being forced to reduce rents by one per cent per year since 2016, the UK's Institute for Fiscal Studies has calculated that this will equate to a 12 per cent reduction in real terms by 2019/20. Add the need to comply with this year's GDPR legislation and housing providers are under ever more pressure to achieve more with less. So how can housing providers relieve the pressures on their finances?

Improve the purchasing process

Budgets have an important part to play in cost control. The early recognition of problems is essential for corrective actions to be timely and effective. Purchase-order processing (POP) systems that provide budget holders with visibility of the consequences of their actions at the point they make a spending commitment are a good start.

However, the historic problem with purchase-order systems has been that they haven't been user friendly, so those who have avoided using them have had an excuse not to.

Simplifying and streamlining the user experience

It's important that any purchasing platform is as simple as possible to use. Employees are far more likely to engage with the system if requests for purchases resemble the user experience in their consumer lives with 'point and click' functionality.

Digital technologies, such as POP systems which enable the budget holder to view the housing provider's financial

position against a budget in real-time and simplify the PO creation process, can result in touchless processing once the goods or services have been received.

These POP systems allow the electronic capture of invoices on receipt from suppliers and automatic matching to proof of receipt and invoice values. Supplier invoices that match can pass through automatically, while human intervention is only needed when discrepancies arise.

These transactional processes deliver efficiency improvements with no loss of control, as safeguards and monitoring have been brought forward to the point of purchase.

Direct and indirect benefits

The direct benefit to businesses of introducing a POP system is the reduction in time spent processing transactions, and the significant improvement in processing time, with invoices processed in days rather than weeks.

The indirect benefits derive both from faster processing and the improved visibility and control provided by the POP system. Faster processing ensures that transactions are already on the ledger at month end.

It also improves the visibility of purchases, while highlighting those goods received without an invoice, making it easier to process those accruals.

The controls provided by a POP system include full audit trails from requisition to

payment, so management and auditors have greater assurance that the process is complete and accurate, and this visibility reduces both management time and audit costs.

Cash flow, planning and forecasting

Any reduction in income can cause an immediate and serious strain on housing providers' cash flow. Cash flow planning and forecasting is therefore critical, and the visibility of future cash commitments at the point of purchase allows control against budgets and plans, and facilitates reliable cash flow forecasting.

Adactus is a good example of a housing provider which has successfully implemented a POP solution to create more robust controls over spending across multiple departments.

Prior to bringing in the POP system, Adactus was struggling with manual processes which were leading to long delays in processing invoices. Using the new solution, Adactus is more in control of its spending across departments, increasing transparency and accountability in the process.

It's highly unlikely, at least in the short term, that budgets for housing providers will increase and so they should continue to plan to achieve more with less. A POP system that improves efficiency, visibility and control over the purchasing process can play an important part in helping them achieve this.

Ian Smith is the financial director and general manager at Invu.

CITYWEST EXTENDS ORCHARD CONTRACT



CITYWEST HOMES

CityWest Homes has signed a new five-year agreement with Orchard, including continuing investment in Orchard's housing management software and its digital platform, as well as managed and hosted services.

Kevin Adams, CIO, CityWest Homes, said, "By integrating our existing CRM system with Orchard's new digital platform, we can provide sector-leading digital services to our tenants and drive efficiencies."

We believe technology can empower housing providers to make a difference to tenants' lives

Capita is leading the way in the research and development of how smart homes in social housing can improve tenants' lives whilst making it easier, and more cost-effective, to manage these homes.

From energy and damp sensors to advanced analytics and warning systems to help protect vulnerable people, our focus is on holistic, connected systems which offer a realistic, affordable solution across a large number of properties.

Talk to us about how technology can help you avoid costly repairs and claims, whilst providing a better quality of life for all those living in social housing –
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SOCIAL & FINANCIAL SCORES FOR YOUR HOUSING PORTFOLIO

Rowley Maggs, Director, SDS

We are increasingly asked by housing providers to help them gain a holistic view of their property portfolios. They need social and sustainability metrics alongside the financial NPV scores to achieve the objective of reporting both financial and social returns across their business and as the saying goes, "what gets measured, gets done".

Having a combination of financial and social scores enables the housing provider to better know and understand their portfolio. They can investigate and plan their strategic and tactical investment responses and act accordingly. For example, an area with a low sustainability score might be experiencing low tenant demand alongside high void rates and above-average turnover. Resident surveys may indicate an underlying desire to live in the area, but hampered by a lack of child-friendly outdoor spaces. The housing provider can therefore invest in local amenities or youth-focused social programmes to help alleviate

INDICATORS	INTERNAL DATA EXAMPLE	EXTERNAL DATA EXAMPLE
FINANCIAL	NPV	Open market value
ECONOMIC	Energy score	Fuel poverty
SOCIAL	Anti-social behaviour	Crime deprivation
HOUSING	Number of repair visits or void & turnover rates	Income deprivation among older people
SATISFACTION	Resident surveys	Peer comparable

this situation. This will improve the sustainability of the local area alongside making use of and earning rent from previously void properties.

Data categories can be broadly split into internal and external data. Internal sources will usually be at the unit or scheme level, and dependent on the strategy and focus of the organisation. External sources may be limited to 'lower super output area' if from an official government source, although postcode- or unit-level data may be available from commercial providers. Consider the examples in the above table.

The data sets available on your property portfolio are wide and varied, from internal system-generated property data and commercial data sets to publicly-published data sets. The skill is in processing that data so that it's meaningful to the person who receives it and turns it into relevant information. A clear understanding of the priorities of your organisation will allow the most useful data to be selected and turned into insights to improve the financial and social value for your organisation and its property portfolio.

Rowley Maggs is a director of SDS.

MIDLAND HEART STREAMLINES PROCUREMENT WITH PROBRAND

Midland Heart has streamlined its IT procurement processes using the Probrand Marketplace buying platform.

Rob Cross, technical service team leader, Midland Heart, said, "Procuring IT products and services can eat up a lot of time; without preferred suppliers, we would have to go out to three different suppliers. And we needed a more efficient solution than that."

Midland Heart looked at Probrand Marketplace which helps users save time and money by offering price comparisons on more than 300,000 products from over 2,500 brands and suppliers. All prices and stock levels are updated by-the-minute in a 'live' transparent environment which the Midland Heart team can access online at any time.

Probrand Marketplace gives Midland Heart access to sector and technical consultants when needed, helping Midland Heart

to source items and then employing Probrand's technical engineers to deploy them when required.

Probrand's consultants also alert the team when market prices are at their lowest and when sector-specific discounts become available to housing providers. If Midland Heart chooses to buy at an opportune moment, it can then take advantage of Probrand's bonded stock service which lets them put items in storage until required.

Midland Heart said that access to Probrand's IT procurement consultants and technical expertise has been a great help, especially when it has needed to source obscure items or more complex solutions. This level of knowledge proved highly useful when Midland Heart wanted to deploy an HP Synergy infrastructure platform and modular storage array. Cross said: "Having Probrand on hand to talk to, and being able to engage their technical team alongside that of a vendor's

engineers to ensure the specification is correct and installed properly is a significant advantage. On a day-to-day basis too, it's great to be able to have conversations with them and trust the advice given is right.

"When it comes to researching prices and stock availability, my team now check the Probrand Marketplace daily. We regularly benchmark to ensure we're getting the best prices and about 85 per cent of the time Probrand has the lowest.

"Probrand's bonded stock service has been essential. This was especially helpful when we bought 85 machines and monitors for a project which was delayed; we would have had nowhere to store them if it wasn't for Probrand. This can also be very handy if you buy ahead of time. Probrand know our buying patterns, so they will let us know when prices hit a low point. With the bonded stock arrangement, we can buy now and deploy later."

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contract management SaaS job costing
Housing repairs systems
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performance management chose voids & planned work
materials
The SAME company
Cloud Dialogs

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SUCCESSFUL E-PROCUREMENT IN HOUSING

Iain Dawson (L), Head of Procurement, Anchor Group, and Richard Porter (R), Business Development Manager, Science Warehouse

In this interview, Anchor Group's head of procurement, Iain Dawson, and Science Warehouse's business development manager, Richard Porter discuss their joint implementation of a new e-procurement and e-invoicing system.

What were the reasons behind Anchor's transformational change?

The driving factors were to make buying easier for our staff, reduce the internal costs of our ordering and payment processes and to help with the consolidation of our support services function. It was also about being more efficient; any savings we can make are ploughed back into the business so we can continue to improve our services for the older people living with Anchor.

How did Anchor approach this?

Part of this project identified the need for an electronic catalogue to complement our existing ordering process, using a standardised coding system which could be applied to all areas of supply, supporting electronic invoicing through 'PO flip' (the rapid conversion of a purchase order into an invoice) as a minimum, with integration to our ERP platform. The solution also had to include a supplier-neutral user interface to simplify the ordering experience for our end-users.

We investigated a number of IT suppliers, spoke to a number of other organisations who had similar solutions and invited a number of best-of-breed suppliers to competitively tender.

How long did the project take?

The first phase, covering the electronic catalogue, took around 10 months. This was longer than expected because our wider transformational project included extensive internal IT infrastructure changes and these took priority for our available technical resources. We also found that the availability of external technical resources was limited because a number of other organisations were carrying out similar implementations.

What have been the benefits of e-procurement?

Our spending data is now much more granular due to standardised categorisation. We have just finished implementing the second phase of the project, covering e-invoicing which will give us hands-free, per-line invoice matching for the suppliers on Science Warehouse's eMarketplace, with detailed purchasing descriptions on each line of the invoice. Around 60 per cent of our front-line goods and services ordering is made on the platform and we expect over 80 per cent of invoices from

those transactions to be automatically processed.

What's next?

We're planning to expand the solution with the addition of Science Warehouse's eServices and eQuotes modules to ensure we get the best from eMarketplace.

Do you have any suggestions for other housing providers considering e-procurement?

My first suggestion would be to engage very early with your suppliers during the supplier on-boarding process, especially if they aren't familiar with UNSPSC (United Nations Standard Products & Services Code) and working in a hosted marketplace. My second suggestion would be to take the plunge and fully embrace level 4 UNSPSC because you will gain incredibly accurate spending data to support your procurement function and it will greatly enhance your ability to have truly hands-free e-invoicing, which your accounts payable team can trust.

Iain Dawson is head of procurement at Anchor Group, and Richard Porter is business development manager at Science Warehouse.

MOBILE WORKING

Castleton's repairs contract with Places for People

Places for People has extended its contract for Castleton Technology's Maintain software (formerly ImpactResponse), covering repairs management, technical services, cloud hosting and integration middleware for the housing provider's core business applications.

The Castleton software is now being used by 500 repairs and maintenance operatives, 200 back-office staff and 60 customer service advisors, and covers over 60,000 properties

for responsive repairs and cyclical maintenance, including gas servicing and electrical testing.

Steve Mather, property services director, Places for People, said, "Our operation continues to grow as we take on delivery of an increased range of services both for companies within the Places for People group and external clients. Our partnering arrangement with Castleton is key to the successful expansion of our operation and the continued delivery of services to our customers."

Going beyond keeping your finances in check

Whether you are managing the turnover of suppliers, handling organisational restructures or obtaining the right information and reports when and where you need them - your finance function **not only** needs a **reliable system** to manage such challenges **but also requires** the **knowledgeable support** and **expertise** from **your solution's supplier**.

We are **working with Housing Finance customers** throughout the country who have **turned to us for our expertise** in managing such issues.

Each implementation or reimplementation of the Orchard Financials system is **wholly owned, managed and delivered by Orchard's team of experts** and it's testament to them that Orchard has recently been awarded **Advanced's 'Best OpenAccounts Business Partner'** for the **11th consecutive year**.

Don't just take our word - check out our Midland Heart case study:

<https://www.orchard-systems.co.uk/case-studies/detail/why-change-or-re-implement-your-finance-solution>



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THE IMPACT OF MOBILE TECHNOLOGY IN HOUSING

Cher Lewney, Head of Housing, Hitachi Solutions Europe

Mobile technology is rapidly developing and early-adopting housing providers are already seeing the benefits to their frontline staff, field service operators and their customers. Capability is developing all the time and some technology specialists are working directly with housing providers to provide systems exactly tailored to the housing sector.

There are three elements that make mobile technology so appealing to housing providers:

1. First-time fix: sending the right person, with the right skills, at the right time;
2. Financial efficiency: reducing overhead costs and minimising waste;
3. Improved tenant experience: the ability to self-serve via online tools and apps.

As tempting as these benefits may sound, it's worth remembering that it's crucial to choose a mobile solution accurately aligned to your business processes. When selecting mobile systems to enhance your offer, the specific requirements of your day-to-day operations must be taken into account; the mobility workflow solution needs to work for you.

For example, a member of staff might be called out to an ASB case – a situation that is likely to entail a multi-faceted or even multi-agency approach. The case may require a range of responses and need a more sophisticated tool to record the entire process in one place. It would include elements such as the ability to take witness statements, record signatures and take photographs, so every aspect of the task is mobile.

The capacity for mobile repairs has been around for some time, with varying degrees of success. New products are evolving to better support dynamic management and scheduling. These products ensure that an operative can complete a task end-to-end with a properly thought through business

process such as, for example, the ability to take payments for chargeable repairs. This saves a huge amount of time for staff (one visit instead of two) and vastly improves the service to the customer.

So, not only does mobile capability improve the front-line staff experience, it also has the power to greatly improve business functions. There are two key ways in which this is apparent:

1. The ability to automate tasks to improve efficiency and effectiveness;
2. The ability to remove duplication.

There is some discussion about the difference between mobile apps and mobile applications and their use in the field. There are certainly some processes that appear to be better suited to be delivered as a mobile app on a phone. An example of this might be a tenant checking their rent balance, which is a simple task requiring a just few clicks without the complication of entering personal details, such as an address, every time. However, the data captured via a stand-alone app may need to be integrated with back-office systems, adding another layer of complexity and maintenance overhead.

Mobile applications, however, are the platform to drive true, agile and responsive mobility. Mobile applications ensure that all data is automatically fed back, making the system fully integrated. It holds all relevant data, which can be accessed and actioned remotely. There is a perception that apps from platform-based applications are not as straightforward for the user, but they can be just as intuitive and user friendly, with the added advantage of automatically updating and continually recording all relevant data.

Housing providers will rightly be looking at the potential RoI possibilities of changing their systems to fully mobile solutions. There is no doubt that prudent

investment in the right technology can dramatically improve efficiency and therefore RoI. For example, removing the possibility of the duplicated handling of requests means an immediate reduction in wasted staff time, together with improved outcomes.

Mobile solutions can also lead to greater job satisfaction for staff; instead of battling with disparate systems, mobile solutions support staff to deliver right-first-time resolutions to customer requests. Mobile applications also offer the prospect to work flexibly, which is very appealing to some and could lead to greater staff retention.

This new way of working provides the opportunity for a shift toward a mature management style to establish coherent teams. Managers will need to think imaginatively about how to encourage working relationships by creatively scheduling team catch-ups and meetings. This may mean meetings take place in more flexible locations instead of in offices, which has the added advantage of more visibility within the community.

The capacity for dynamic scheduling is of utmost usefulness for housing providers today. It means that field-based staff can hold all the information they need for their daily appointments on a mobile device. For example, if your staff are working over a 25-mile patch, smarter scheduling will make sure those appointments are arranged in the most time-efficient way, eliminating doubling back over the territory or needless trips to and from the office. This depth of scheduling holds specific details of each task, making it easier to achieve right-first-time allocation of staff and resources.

Sequential scheduling is also a particularly beneficial function within a mobile solution. Historically, successful

THE IMPACT OF MOBILE TECHNOLOGY IN HOUSING

Continued from previous page

sequential scheduling has been very difficult to achieve. Some new platforms have developed this capacity much more effectively, allowing tasks that require the input of multiple trades to be automatically sequentially scheduled. For example, a replacement door may require a carpenter, a painter and a locksmith; the ability to automatically schedule appointments for these different trades in the right order is very time- and labour-saving.

How does all of this technology work if there is no mobile signal, for example in a rural area? Mobile systems must include offline capabilities. That is, the

capability to store data until the device is connected again. This ensures that no information is ever lost and cloud-based technology makes it a reality.

In conclusion, every organisation will come to this new technology with different needs and desired outcomes. Working very closely with the technology provider has to be of primary importance. This is not just an opportunity to choose new software, but an opportunity to choose a new partner to collaborate with you and your staff through the change, support your evolution into the future and take pride in your success.

Mobile solutions offer a new way of working with a 360-degree overview of the business. However, it can be a daunting prospect to know where to start. Carefully choosing a sympathetic technology provider capable of supporting housing providers to realise their full potential in a fast-changing world is the first step.

Cher Lewney is head of housing for Hitachi Solutions Europe.



TELECETERA CONNECT AT CHELTENHAM BOROUGH HOMES

Shane Watson, Karen Langridge & Emma Wall from Cheltenham Borough Homes

Cheltenham Borough Homes is using Telecetera's Connect Enterprise mobile software for electrical testing (electrical installation condition reports); the housing provider's team explain how they are getting on.

What made you decide to go digital for electrical testing (EICR)?

Shane Danson, electrical and mechanical supervisor, Cheltenham Borough Homes, said, "We've been asking for years to get the periodic inspections digitised because we could see how much time it would save. We were aware of other systems but we wanted to use Telecetera's Connect Enterprise software because it's a really flawless solution and so easy to use.

"Before the introduction of Connect Enterprise, we were drowning in paperwork, even to the extent that it was putting us off taking on temporary staff to help. Now if we need a temp, we just give them Connect and they are out on the road straight away.

"All electrical tests are managed through Connect, from making appointments with tenants through to completing the EICRs and issuing the certificates, so no more scanning of paperwork or problems with storing the information because it's all easily accessible in Connect."



"Compliance will be huge in the housing sector, especially after the Grenfell Tower tragedy. In the past, all the focus has been on gas safety since that's a legal requirement. The EICR scheduling and mobile working software has enabled improvements in workforce management, voids and periodic repairs and most

significantly our ability to provide accurate data and an auditable trail in relation to health and safety, compliance, performance and complaints. It's incredibly important that we look at all aspects of compliance and I can confidently say that today we are 100 per cent compliant."

How important is compliance for you?

Emma Wall, head of building services, Cheltenham Borough Homes, said,

What are the benefits of Connect?

Karen Langridge, logistics manager, Cheltenham Borough Homes, said, "It's the basic things that really make a difference to the process. We no longer have to go into the letters and type them up. There is a direct link to the EICR certificates in Connect so there's no scanning or having to manage the certificates manually. We also have more control because the data from previous EICR tests will be prefilled for the next test."

CITYWEST PIONEERS STICS CONTACTLESS BOILER SERVICING



CityWest Homes has reported that it is the first UK housing provider to introduce an innovative technology to transform how it services its boilers.

Using the same contactless technology as payment and Oyster cards via a chip in each boiler, the new system from Stics Asset Control allows engineers to access all boiler information simply by tapping their smartphone on it.

By allocating a unique code to each boiler, engineers use an app on their smartphone to access information on each boiler, allowing them to review, assess and update CityWest Homes' records in just a few seconds.

With the Gas Safety Register estimating that over one million false certificates are issued each year, the contactless technology ensures that gas certificates can only be filled in if an engineer has physically touched the boiler with their phone,

guaranteeing authentic certification, monitored via a check in, check out process.

Developed by Stics Asset Control, the technology has previously been tested on and rolled out on emergency lighting, plant rooms, and used in the security and healthcare sectors but this is the first time it has been adopted on this scale.

John Hayden, head of mechanical and engineering, CityWest Homes, said, "We began rolling out the Stics technology across our properties over the past few months and have already seen a dramatic increase in efficiency, particularly in the reduction in time it takes our engineers to perform a boiler service."

The new technology is currently installed in 79 plant rooms and is expanding into tenanted properties at the rate of 60 homes per week, with complete installation across over 7,000 tenanted properties expected by May 2018.

Coastline takes Service Connect from Cloud Dialogs

Coastline Services, the commercial arm of Coastline Housing, has completed the implementation of Cloud Dialogs' Service Connect to support its repairs, job costing and appointment scheduling operations.

Service Connect is designed around giving individual managers and supervisors dashboards that show them anything that needs attention in real time. Coastline said that this has led to a change in culture where processes and issues are managed as they arise and creates much greater transparency across the business, with Service Connect and its repair appointments embedded

into Coastline's Microsoft Dynamics CRM software.

Barry Cox, project manager, Coastline Housing, said, "As the business began to understand what Service Connect offered, it became clear that it should manage everything relating to property maintenance, not just the in-house workforce. Coastline Services contracts a large amount of work externally and this process could be significantly improved by extending Service Connect across the business."

With the implementation for responsive and minor repairs taking just 20 weeks

to complete, the first 'go live' part of the project included direct integration to Jewson for stock replenishment, saw over 20 sub-contractors using the contractor portal, full mobilisation of Coastline's in-house operatives, appointment booking embedded into Dynamics CRM and tight integration to Coastline's two SunAccounts systems.

Allister Young, chief executive, Coastline Housing, said, "This has been the smoothest transition and go-live I have experienced in my career and should set the bar for future IT projects."

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Wirral Methodist Housing uses Gas Tag for 'no access' visits



Wirral Methodist Housing Association (WMHA) was the first housing provider to adopt Gas Tag's gas servicing software. John Harris, the housing provider's cyclical and planned property surveyor, explains their use of Gas Tag.

What were the main reasons for choosing Gas Tag?

Accessing properties has always been a logistical problem for gas safety visits. This is compounded by the need to show evidence of attempts to gain access. Gas Tag provides our engineers with the ability to try to call tenants in order to assist with access. The system also accurately logs access attempts should we ever need to evidence this.

The gas servicing data is now available to all relevant staff rather than just one or two people, which means an improved service as a result of data sharing; if I'm away, someone else in the team can see what's happening. The system also allows us to be completely compliant with up-to-date changes to gas legislation, and contractor performance can be audited via simple reports.

What are the benefits of Gas Tag?

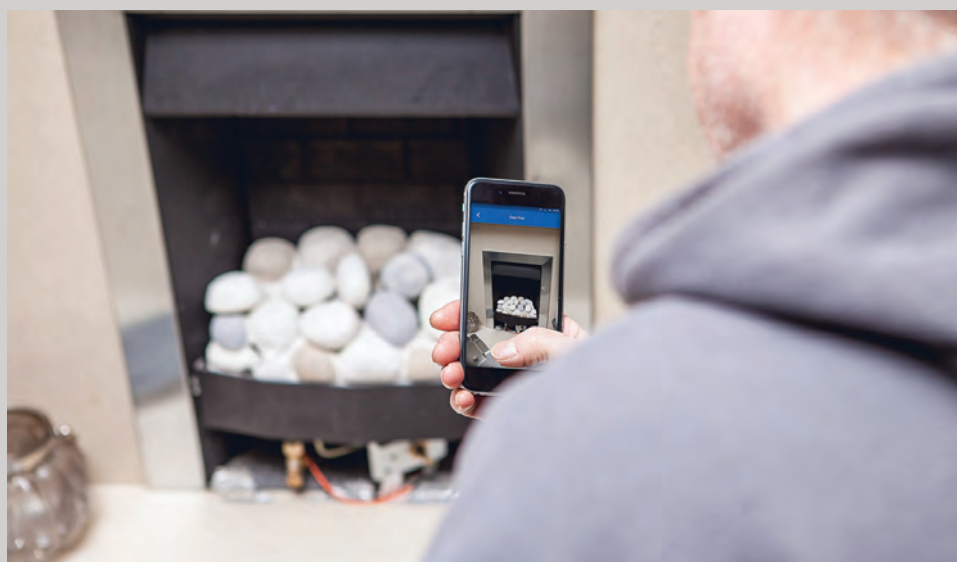
There are a number of benefits including the more efficient processing of appointments and evidence of access attempts, real-time gas safety certificates, and flagging of what is 'immediately dangerous' and what is 'at risk'. This reduces unnecessary letters and phone calls to tenants which were previously needed for 'no access' issues.

How have you managed your contractors when switching to Gas Tag?

Contractors were invited in to view the software where all of the benefits were fully explained. It was important for our contractors to understand the difficulties 'no access' posed for us and therefore the reason for introducing Gas Tag.

How does Gas Tag help with legislative compliance?

We have always taken our responsibilities for health and safety very seriously, seeking ways to improve where we can.



We saw Gas Tag as a good solution to address our concerns about evidencing access attempts, and found the product offers this and so much more. As a result, we have improved services to tenants and made efficiency savings as a result of its implementation.

What are your tips for gas safety compliance and 'no access' difficulties?

To help address potential issues with gas safety compliance, housing providers should validate all engineers' qualifications on an ongoing basis and ask for photographic proof of all work carried out within each home that is geo-tagged and time-stamped. Choose a centralised digital solution which gives you visible access in real time so that you can check gas certificates as they come in, as well as being able to produce automatic reports in real-time.

GAS TAG GAINS PRIVATE EQUITY BACKING

Gas Tag has secured a multi-million pound investment from private equity company Waterland. The deal, which values Gas Tag as worth in excess of £20million, will enable the business to scale up its operations in the UK and internationally. In return for the investment, Waterland will gain a minority stake and two of its senior team will join the Gas Tag board.

Started in 2015, Gas Tag uses bespoke technology to help housing providers and local authorities to combat the scourge of illegal gas fitters and enforce gas safety regulations. As soon as a physical Gas Tag is installed on the gas outlet in a property, the software tracks and records all of the property's gas appliances and any gas works carried out at the property, and can only be used by 'Gas Safe' registered engineers.

Stephen Ullathorne, CEO, Gas Tag, said, "The Waterland investment will be transformational for us. We didn't just want an investor, we wanted a partner and Waterland stood out as the perfect fit with our ambitions for Gas Tag."

"There is a growing acceptance across the industry that it is no longer acceptable to leave gas safety to chance. Gas Tag is unique in providing housing providers, local authorities and landlords with a real-time, proactive approach to gas safety."

Andy Scaife, managing director, Waterland, said, "Gas Tag is a very exciting and innovative company, exactly the kind of business Waterland looks to invest in. We are delighted that this is the first investment by our UK team."

4SOLO LAUNCHES CONTRACTOR COMPLIANCE SOFTWARE



4Solo has recently launched Comply Tag and CompTrain for housing providers to automatically record in one online database all work undertaken on their properties and for real-time compliance checking.

Comply Tag enables users to set up tags to monitor every aspect of work undertaken on a property or site, with their contractors then downloading a free Comply Tag app to their smartphones. When the contractor starts work, they scan the QR code on the tag with their phone. Their location is automatically

verified using GPS and when they scan off, a record is automatically created in the database showing who undertook the work, how long they took and verifying they were at the property.

Tenants can also use the app; by scanning a tag they can see a record of all the work carried out. For example, they can scan the tag on their boiler to see if the inspection is up to date alongside an image of the paper certificate.

For contractors, the work undertaken is recorded simply by scanning the tag and selecting the type of work relevant to the tag from a pre-loaded list, as well as seeing a history of previous work carried out, saving time on paperwork and helping to resolve problems faster.

4Solo's CompTrain software stores and tracks all staff and contractor skills and competencies, entered online, imported from an Excel spreadsheet or via direct links to existing housing management systems. Staff or contractor cards can be



ordered online, and delivered centrally or to individual sites; each card has a unique QR code to identify them in the 4Solo system.



CompTrain also includes online induction and training materials. All training and induction records are maintained in a single searchable and reportable database, eliminating the need for paper records.

CUSTOMER MANAGEMENT

Peaks & Plains' Capita portal

Peaks & Plains Housing Trust is now using Capita's OpenAccess software to create a tenant portal, integrated with its OpenHousing, DRS and Totalmobile software for housing management, scheduling and mobile working.

Gary Naylor, repairs operations manager, Peaks and Plains Housing Trust, said, "By using OpenAccess integrated with OpenHousing, DRS and Totalmobile, the tenant simply logs into their account to report a repair, which then automatically raises a job and searches the maintenance team's diary for the next available slots. These are then offered immediately to the tenant to select and

book their appointment. Customers can also upload photos of the repair and a description, so that the maintenance engineer can arrive as prepared as possible to fix the issue on the spot, reducing the need for a second visit."

Neil Bancroft, head of service improvement, Peaks and Plains Housing Trust, said, "Already more than a third of our customers, around 2,000 people, have signed up to manage their account online and around 30 per cent of the available repairs and inspections are now booked via the portal. More than 4,000 rent payments have also been made online.

"And because OpenHousing is fully integrated, whenever our tenants make a payment, log a repair, or change their contact details, this is all written directly into our Open database as a result, we have the most up-to-date information in real-time, ensuring we're better able to get in touch with our tenants, and that we have the full picture at our finger tips."



THE IMPORTANCE OF UX AND UI

Cristina Dunn, UI/UX Designer, Orchard

Mobile technology is rapidly developing and early-adopting housing providers are already seeing the benefits to their frontline staff, field service operators and their customers. Capability is developing all the time and some technology specialists are working directly with housing providers to provide systems exactly tailored to the housing sector.

What does it mean when we talk about UX & UI?

UX is short for user experience and is essentially about how a person feels when using a product or service. As well as the core usability of the product, we look for how easy it is to use the system, efficiency in performing a task, the general design and user accessibility. The UI, short for user interface, of a product plays a large part in the overall user experience. User interface design mainly focuses on the visual elements, presentation and interactivity of a product.

In an ideal project, subject to the available budgets and resources, there are a number of typical activities and outcomes a UX/UI designer would carry out before and during the development process. These include:

- User research
- Personas
- User flows
- User journeys
- Wireframes
- Prototypes
- User testing

The benefits of these activities promote collaboration with stakeholders in the project and provide a clearer vision. It helps to visualise and find simple solutions to complex business challenges. The agile process in which these activities are conducted means that we can validate our design solutions much faster and in some cases, spot problems much earlier, which in turn will minimise risks for the whole project. The most important aspect is that by

collaborating with our customers, we have a user-centred approach when designing our products.

Why is UX & UI important to Orchard?

We recognise that not only do our products need to look good, they also need to feel good. As with most procurement processes across various business environments, customers tend to look for something that not only appeals to them visually and is functionality-rich, but that is also simple and easy to use or navigate. So, essentially, UX and UI are important to us because they are important to our customers, and I'm sure the same can be said for most software providers, with UX and UI playing such a key role in the product development lifecycle. Orchard has taken a customer-focused approach in designing products that meet customers' needs yet are flexible enough to adapt when those needs change.

My role at Orchard is to understand our users and their needs, making sure we build products for the right target audience; ensuring that our users have a positive engagement with our products at every touch point. Acting as the user's voice during the product development process, I help to enforce the user-focused message across the whole team. A well-designed UX engages the user and encourages the user to keep coming back, and that's what we strive to achieve.

The value for customers

A product with a good UX and UI may have more benefits than you might think. It can help to achieve an increase in productivity through efficiency, reduce training time and costs, reduce maintenance costs and improve staff retention through job satisfaction. In today's climate, with the increasing workloads that many employees face, our focus is to make it easy for our customers to use our solutions and to alleviate some of the pressure that they often have to deal with, by providing them with these benefits.

Exciting times ahead

Over the coming year, I will be focusing on a couple of new projects as well as looking at continuous design improvements within our existing Orchard solutions. Here are a few areas that I will be working on:

- A consistent look and feel across all of Orchard's products: consistency is key to users experiencing the same look and feel across any products that we provide.
- Improvements on microcopy: when clicking on a button or submitting a process in our applications, microcopy is where error messages, alerts and form labels come into play and the experience the user has with being presented with unhelpful text or messages.
- Consideration of the 'unhappy paths': putting ourselves in the shoes of our users is very important for us to understand how a user interacts with our products. We want to cover all bases of a product, so that even when something goes wrong in the system, users are signposted back to the 'happy path'.
- Gather more user feedback: the agile development methodology extols the virtues of regular customer feedback, with an iterative process in feedback, design and development. We will be incorporating this philosophy more and more in how we address UX and UI in our core development teams.

Working on these principles, and knowing that our ProMaster asset management system is one of the most functionality-rich software solutions available to the social housing sector, we have brought new life into the product with an updated look and feel. Look out for further information on the release of our new ProMaster UI on Orchard's website.

Cristina Dunn is a UI/UX designer at Orchard.

Flagship's Switcher IoT expansion

Following the successful trial of Switcher IoT devices at 10 Flagship properties in 2017, the housing provider is now extending the project to almost 500 properties across Norfolk and Suffolk, with the aim of reducing fuel poverty and rent arrears, preventing damp and mould, and improving boiler maintenance.

The first phase involved Flagship, Switcher, Gasway Services and a number of local companies working together to demonstrate that the technology could work and gauge the potential benefits of using IoT technology.

Matt Brazier, director of IT, Flagship Housing, said, "It's exciting to be at the forefront of using technology in such a

pioneering way. The pilot has already demonstrated that this technology can work so we anticipate the wider rollout will make a huge difference to us as a business, our tenants, as well as the housing sector as a whole."

Flagship's initial IoT project resulted in higher income from earlier rent payments, fewer missed payments following digital reminders, higher tenant satisfaction, more online repair requests and pre-emptive maintenance visits.

Ian Napier, commercial director, Switcher, said, "We're thrilled that Flagship are rolling Switcher out on a much larger scale following the success of the initial pilot. Phase two of this

project will result in a material reduction in fuel poverty across the 493 selected homes and help Flagship to better diagnose repair issues in their housing stock, continuing the shift from reactive to pre-emptive maintenance."

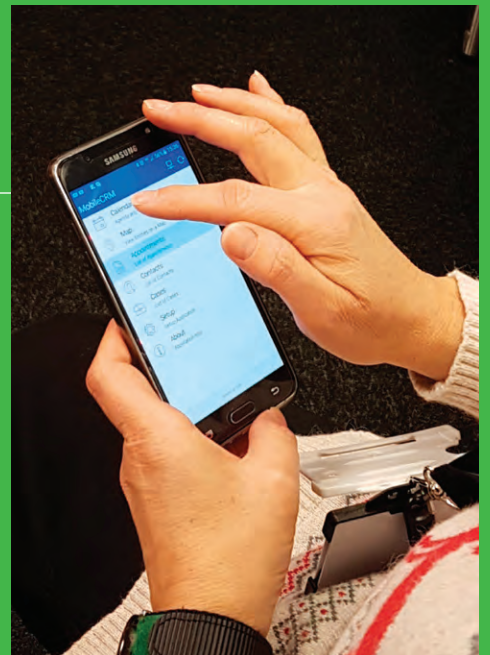


REDKITECRM AT GLOUCESTER CITY HOMES

Gloucester City Homes is now using Microsoft Dynamics365 for its 24-hour Lifelink alarm service, alongside mobile CRM software from Resco. The software was implemented by RedKiteCRM within a very tight deadline.

Paul Haines, head of IT, Gloucester City Homes, said, "RedkiteCRM's combination of flexibility and technical expertise was very impressive and their agile approach was extremely effective. In fact, I'd say that this was the most successful IT project we have ever delivered."

"We now have a system that's easy to use and staff can quickly and securely access tenant details from whatever device they're on. We know that we've only scratched the surface of what Dynamics365 can do for us and we'll be aiming to drive increased value and improved services from our Dynamics365 investment in the future."



PANCONNECT SUPPORTS TAI CEREDIGION'S TENANT ENGAGEMENT

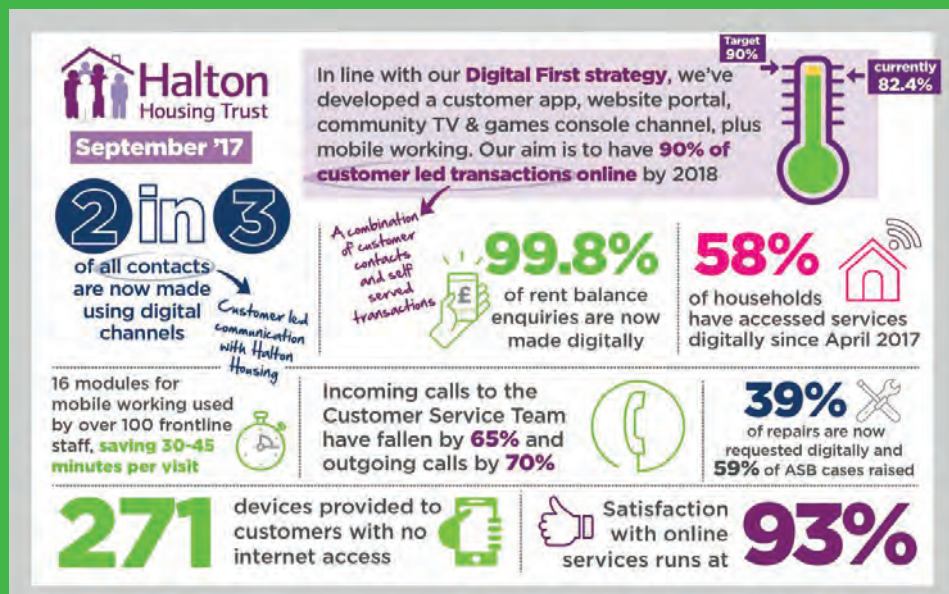
Tai Ceredigion is using Housing Insight's PanConnect self-service portal and app to reinvigorate its tenant engagement strategy. The 'TyFi' ('my house' in Welsh) portal is available in both English and Welsh.

Gavin Harvey, head of ICT and business improvement, Tai Ceredigion, said, "We've seen immediate benefits since PanConnect was introduced. Tenants were instantly more

engaged, and they can now see their live rent balances, send repair requests and report ASB issues.

"The tenants can also update their personal details so that we have the most up-to-date information. The quality of data has improved efficiency across numerous business areas and is helping us achieve GDPR compliance."

HALTON HOUSING EXTENDS ITS AAREON PORTAL



Halton Housing has extended the functionality of its tenant self-service app following its successful launch last year.

With the new version of the app, based on Aareon's 1st Touch mobile software, tenants can manage and pay rent by direct debit and request a rent refund, report repairs and schedule appointments, access Halton Housing's digital toolkit for universal credit, finance advice and moving house, and report local problems such as fly-tipping and graffiti.

Two-thirds of Halton Housing tenants now access services digitally, with 99.5 per cent of rent balance enquiries, 39 per cent of repair requests and 67 per cent of anti-social behaviour reports made online, with the result that incoming customer phone calls have fallen by over 70 per cent since the introduction of the app.

Carole Galsworthy, director of ICT, Halton Housing, said, "Our free app is the 'perfect portable companion' for tenants because it has given them a quick and

easy way to do more online at a time that is convenient to them and is available at any time.

"The initial success of the self-service app gave us the confidence to develop and evolve the breadth of services we now offer online. By listening to our tenants' needs, we have added this extra functionality, thereby adding even more benefits. The 1st Touch system has allowed us to do this easily and professionally and we are already looking to add further services in the future."

Thrive's Aareon self-service app

Thrive Homes has launched a self-service tenant app based on Aareon's 1st Touch software. The myThrive app covers tenants' rent balances, repair bookings, payments, ASB and nuisance reporting.

The app integrates with the housing provider's existing Aareon QL CRM system, so that all online enquiries made via the app are updated on the tenants' main records. This ensures that, at any

time, tenants can always view up-to-date transactions on their account and repairs history.

Jo Barrett, operations director, Thrive Homes, said, "The app is a central element of our transformational digital strategy and we are actively supporting and encouraging our customers to go online and sign up. Our initial soft launch went very smoothly and the first 100 or so tenants are already comfortable with using it.

"We decided to move straight to an app, rather than starting with an upgrade of our website, because we knew that most of our digital customers now use a mobile device to access our webpages. In deciding which system to choose, we already had a working relationship with Aareon and we were aware that 1st Touch is a market leader in both mobile and self-service technology.



"They were especially helpful during the design stage; for example, we asked them to prioritise the menu choices in line with the most common requests received by our contact centre. The slick, comprehensive menu approach follows throughout the app, ensuring it is both intuitive and easy to use."

PEABODY'S PERSONALISED SERVICE CHARGES WITH TRIPARTUM

Peabody is enhancing customer experience and engagement through a new annual service charges communication initiative with TriPartum.

James Shand, managing director, TriPartum, said, "We met Peabody's

key stakeholders and created then delivered a 16-page personalised colour booklet which clearly and concisely outlined each tenant's annual service charges, replacing a standardised, impersonal service charge document."

The project took just three months, including complex data sorting and verification. Peabody reported that 80 per cent of recipients considered that the new format was an improvement and two-thirds found it easier to understand.



HOUSING TECHNOLOGY RECRUITMENT

**HOUSING
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AI AND CUSTOMER SERVICES

Peter Graddon, Director, Omfax Systems

The recent government budget towards the end of 2017 showed us that housing is higher up the political agenda than before, with a government commitment of over £15 billion of new financial support for new housing as well as freeing up housing providers to borrow to build.

With the building of all of these new homes [assuming they get built], housing providers will have more tenants, with increasingly heightened expectations. Housing providers will therefore have to deal with more numerous and more complex service inquiries. So, with our crystal balls at the ready, what will be the impact over the next seven years?

Self-serve

In short, we will see more tenants using online self-service facilities provided by their landlord. For some time, I have been talking to anyone who will listen about the impact that technology will have on the future operations of social housing. Technological developments have had enormous impact on other industries; there has been a virtual revolution. We are used to self-service in supermarkets, across the retail sector, banking, travel and many other sectors.

My prediction is that social housing will see a similar revolution in the way its services are delivered. We have seen it in many ways already with the development of contact centres, web sites, online payments, the use of email and the rise in the use of text messaging and now of social media.

As a result, over the years we have seen the loss of rent collectors, repairs inspectors, local offices and resident wardens. More recently, there has been growth of online self-service, although the uptake has been relatively slow from many housing providers. But there can be no doubt that self-service will have the most dramatic impact on services over the next five years and more.

Artificial intelligence

The introduction of artificial intelligence

(AI) in customer services is probably the most significant development taking place. It moves things forward. To meet growing consumer expectations in a digitally-driven world, landlords have to manage huge amounts of real-time data and create personalised tenant experiences to stay relevant and to field the growing numbers of enquiries as a result of the government's budget's target to build 300,000 new homes per year. It is the application of AI that is transforming many services, from detecting trends in data, to enhancing customer service through virtual personal assistants.

AI can also help customer service providers get more out of the large data sets that have been available to them for many years, but have remained largely unexplored. AI does not degrade over time, unlike other facets of production, but helps organisations to operate and enhance how data held about tenants is collated and interrogated.

AI is able to leverage self-learning systems by using tools such as data mining, pattern recognition and natural language processing. AI is highly scalable and has the potential to deliver huge cost savings; in the not too distant future, every housing provider will wake up to the potential of AI.

So, are we seeing the beginning of the end of human domination? It was forecast that by 2025, a computer would be able to outperform a human. That now looks like being well overtaken. The ultimate aim is the creation of AI machines which match human intelligence, and we are not too far away from this, with the arrival of self-driving cars.

With such forecasts in mind, there can be no doubt that AI will enable many



roles, including those in housing (and especially within customer services), to become more automated, which will assist with the increasing numbers of enquiries from the building of more homes from 2020 to 2025, as highlighted in the recent budget. It will also mean that the role of advisors will significantly change to become more specialised in dealing with the more vulnerable and with tenants' more personal issues.

To create effective AI-based customer service, a human expert is needed to initially give the system the knowledge and design flow pathways using call-flow intelligence to reflect the known and repetitive pathways for a range of enquiries. They can then be refined and extended, based on feedback. Experts are called in to use their knowledge and understanding to help design the call pathways. Data sets relating to the resident, their property, their relationship with the organisation and their history are then added to create intelligent, personalised responses.

Although the impact of the budget and of AI on social housing services has yet to be seen, AI is pushing at the boundaries of customer services and may, in the not too distant future, make current technologies obsolete.

Peter Graddon is director of Omfax Systems.



OMNI-CHANNEL TENANT ENGAGEMENT

Robert McDougall, President & CEO, Upstream Works Software

Delivering an omni-channel tenant engagement approach results in a better experience for both tenants and the agents serving them. It also results in a better bottom line for the business. Thankfully, advances in customer-centric technology make achieving these goals not only possible, but also easy and cost-effective.

Five key omni-channel strategies:

- 1. Ensure your platform is truly omni-channel.** Tenants will choose an engagement method that works best for them, wherever they are and whatever they're doing.
- 2. Offer a personalised experience.** In most cases, you won't need to know every detail about the tenant; instead, provide a feeling of recognition by being able to recall their past interactions, and offer them the right options at the right moment.
- 3. Resolve issues on the first contact.** The notion of the 'customer journey' is one of the biggest customer engagement buzzwords, but one needs to be careful not to confuse the journey concept with a tolerance of excessive interactions; the goal should always be to resolve an issue on the first contact.
- 4. Reduce customer effort.** Speed of resolution is still a paramount concern for both tenants and housing providers. When agents require customers to repeat information following transfers, or lack data about the tenant's past interactions, this negatively impacts the customer experience and drives customer dissatisfaction and attrition.
- 5. Evolve with the times.** To continue to be effective, businesses must evolve accordingly, supporting new channels with the same commitment to a seamless, personalised, and proactive experience that is offered in existing channels.

Although dazzling experiences might be welcome, they are not what is required or expected. Customers, first and foremost, want care that is consistent and easy. They want to be recognised, understood,



and provided with the proper resolution. Delivering this kind of experience may not be extravagant, but it greatly increases customer satisfaction.

Improved customer experience

Achieving a better customer experience is attainable; you can easily create a desirable and effective customer experience by implementing a platform that is omni-channel for both customers and agents. When constructing your CX platform, don't forget to account for your service agents – they need a consistent view for customers, across all channels and across time.

Integrate more than engagement platforms

All related applications and databases should be integrated and accessible from a single agent's workspace. Agents will then have the data when they need it, the business will benefit from maximising the value of existing investments, and management will be equipped to satisfy the interests of both tenants and housing providers.

Know them when you route them

Your omni-channel strategy must approach interactions not as standalone exchanges but as moments in a continuous relationship. To accomplish this, your customer experience platform must provide agents with context and a history of previous interactions, ensuring that they can immediately pick up from the previous touch point.

Accommodate evolution & growth

Tenant demands will change, and new



contact channels will emerge. A truly customer-centric organisation has the capability to adapt as the marketplace changes. It can quickly accommodate changes in tenant expectations, and readily incorporate new channels. Ensure your platform is able to scale, evolve and adapt easily to change, and that you have the management tools needed to provide consistent service.

Measure & manage your KPIs

A fully-integrated customer experience platform provides immediate access to actionable performance statistics. Management should be able to easily determine customer effort, agent success and channel usage. Why are tenants calling, and what's driving repeat calls from them? Which agents are the most effective, and on which channels? The ability to measure KPIs, including first contact resolution (FCR), and customer effort score (CES), across all channels is key to succeeding with the evolution of the contact centre.

Continuous engagement

Continuous engagement is what drives results, and there are many benefits to providing productive, meaningful engagements with your customers. A single agent workspace is the key to great engagements. When agents can easily view all necessary information, they are freed up to engage with that individual and provide a level of personalisation that is too often absent.

Robert McDougall is president & CEO of Upstream Works Software.



A TOOLKIT FOR ACHIEVING DIGITAL BUSINESS TRANSFORMATION

Colin Sales, Managing Director, 3C Consultants

Many consider leadership to be the management of change and the social housing sector is certainly undergoing rapid change.

So how should business leaders navigate and guide their organisation through this change process? A major survey of senior executives in late 2016 revealed that, for most, digitisation was the key, moving services online so that customers could self-serve at a time and place that suited them.

However, technology alone is only part of the solution and those who are successfully reaping the benefits of digitisation have recognised that the toolkit needed to transform to a new business model has five pillars to success: business design; people and culture; process re-engineering; customers; and, of course, technology.

Business design

What will your new business model look like? Seek guidance and support from those who have already been on similar journeys in order to understand what is achievable and what challenges you will need to overcome. You will then be ready to create a vision of what the future will look like.

Understand exactly where you are now, and benchmark your current position so that you can highlight and publicise what you achieve.

Once you have an understanding of where your starting point is, along with the vision of your future operating model, you can create your transformation roadmap with specific, achievable and time-tabled milestones along the way.

As good governance is key, the strategic and operational management of the new business model should be 'data-led', with business intelligence (BI) being a key component of both demonstrating great leadership and supporting the introduction of digital customer services, quantifying success.

A key component to achieving success is the 'first-time fix' KPI. Get your data and processes right and 90 per cent of customer transactions should be able to be resolved on first contact. First-time fix is an 'umbrella KPI' insofar as if you get this right, other KPIs such as those measuring efficiency and cost control, along with customer and staff satisfaction, should also be good.

People and culture

The achievement of cultural change at all levels of your business is likely to be your greatest challenge, but carried out correctly it will often reward you with early wins as the process will often result in initiatives that will address fundamental, but simply and swiftly resolved issues.

The transformation process should be consultative, drawing in those who will help you in delivering change.

The transformation process also provides the opportunity to mentor, develop and empower staff, who will adapt and help identify and introduce ever-better business solutions, recognising when additional training and resource is required or when existing resource can be liberated to address important tasks.

As progress is made, celebrate achievements and recognise those involved; recognition can be a powerful motivator, both to those who receive it and those who desire it.

Process re-engineering

Online services must be automated and processes should be effortless, allowing the majority of tasks to be easily carried out by customers without the need for staff involvement, so liberating them for other valuable tasks required within the new business model.

There should be no departmental silos; workflows need to span departments, appearing seamless to those involved. Processes should also be 'agile' and able to quickly adapt to meet the needs of the

business. Should your business consider a merger, then flexible, effortless processes will ensure your organisation is ready to set the example, or potentially demonstrate that your business can survive effectively on its own.

Customers

We all strive to provide ever-better customer service and customers are also becoming more demanding, wanting to deal with you at a time and place that suits them. Digitisation addresses these challenges, with online services providing both the business and its customers with the answers they seek, swiftly and accurately with the minimum of inconvenience. Those that are pioneering digitisations within the sector believe that for most it will be possible for 80 per cent of transactions to be automated and carried out online by customers within a three-year period.

Technology

Technology is the key enabler, the foundation stone on which efficient business process and security can be built. Your technology solutions must be integrated and seamless, supported by accurate, available and secure data that flows between software applications; there should be no software silos.

Technology should leverage the best from the cloud, delegating responsibility for certain components of IT to specialists, such as business continuity and disaster recovery. This again liberates staff to focus on other important tasks within the new operating model, such as ensuring there are no missed revenue opportunities; developing new income streams and assisting those tenants that are struggling with financial and digital support.

Carefully leverage the best from social media and video as increasingly this is becoming the method of choice for communicating and getting swift responses from customers, groups and communities.

A TOOLKIT FOR ACHIEVING DIGITAL BUSINESS TRANSFORMATION

Continued from previous page

This is just a brief summary, but using this toolkit will not only allow you to achieve a more efficient and effective business model, but it will support leadership throughout your organisation.

Your business will become increasingly secure; your staff will be developed,

liberated and empowered; your customer service will rival those that are considered the best; you will be able to demonstrate good governance; your customers will be supported to draw from the enormous advantages the internet can provide; and, importantly,

your job will become easier and more rewarding.

Colin Sales is managing director of 3C Consultants.

Prodo Housing wins Accent self-service project

Claire Stone, Executive Director of Customer Experience, Accent Group



Prodo Housing, part of marketing agency Prodo Digital, is rebuilding Accent Group's existing tenant portal, including revised income processes for rent payments and direct debits and a new approach to on-boarding new tenants.

Prodo Housing won the online self-service project from Accent following a six-way pitch and a formal tender process managed by 3C Consultants. Claire Stone, executive director of customer experience, Accent Group, said, "Our tenants' expectations of our online services are shaped by what they experience daily with major retailers. Our aspiration is to not only offer the same level of digital engagement, but to provide even higher quality services."

INFRASTRUCTURE

Broadacres' infrastructure refresh with Central Networks



Central Networks has completed a full IT infrastructure refresh at Broadacres Housing Association, based on Fujitsu servers and SSD drives, Veeam replication and Cisco switches.

Faced with a disparate ICT infrastructure and ageing components, combined with deteriorations in the performance of its core business applications, Broadacres appointed Central Networks to lead a full infrastructure refresh.

Central Networks began by reviewing the core switches which had a maximum throughput of just one gigabyte per second with no option for upgrade. A new 10 gigabyte core switch backbone using Cisco switches was installed to provide a new future-proofed framework. Fujitsu servers and storage, including SSD drives, were installed to upgrade the core infrastructure.



With the growing volume and increasing sensitivity of Broadacres' stored data, Central's review of disaster recovery RTO and RPOs saw the specification of a Veeam backup-server for the production site and replication server at an off-site location in Manchester.

Mark Birch, head of ICT, Broadacres Housing Association, said, "Following the successful completion of our

infrastructure project with Central Networks, we have seen as much as a 60 per cent improvement in the delivery of key business applications; a tenfold increase in networking speeds; a new RTO and RPO of under six hours and all delivered with zero downtime for our users."



NEW YEAR RESOLUTIONS FOR SERVICE TEAMS

Simon Johnson, General Manager UKI, Freshworks

January can be difficult. It shouldn't be a surprise that stories abound about 'Blue Monday', the so-called most depressing day of the year.

However, the beginning of the year can be a great opportunity to re-evaluate how we approach big issues and challenges. The custom of New Year's resolutions has been with us for more than 4,000 years. For ITSM and service desk teams, setting some resolutions can be a great way to take advantage of new technology options, to implement different approaches to service and, most importantly, to make these improvements stick.

Here are five resolutions that you can use to improve your approach to IT service this year:

1. Can your helpdesk and service desk teams learn from each other?

For housing providers, service can be defined in two ways; how you provide help to tenants, and how you support employees. External requests for maintenance or information would come through to a helpdesk, while internal issues or requirements are handled by a service desk.

For some companies, the helpdesk and the service desk are one and the same, handling all enquiries and issues. For others, these two audiences are kept separate. Either way, you can look at how to improve your internal service quality by learning some lessons from external customer service.

For internal service desk teams, looking at customer service and helpdesk implementations can be a great source of inspiration. As users experience new consumer online services, they expect similar levels of support from the other services they use. The growth of easy self-service and support over multiple channels is a good example.

Using some of the self-service tools that external customer service teams deploy can help, but the main resolution here should be on the processes that these tools support.

2. Can you make your self-service more selfless?

Self-service is growing in popularity for IT service management, particularly when it comes to simple requests. Most teams implementing ITSM will have some self-service elements in place, from sources of information that people can access to identify their problems through to more in-depth options like chatbots.

However, many self-service implementations disrupt the customer from their day-to-day activities and expect them to go to a self-service portal to raise a ticket. Instead, your resolution should be to look at how to take the service desk to the customer and not have them reach out for the service desk. This means thinking about customer needs, rather than how your IT service desk manages its operations to cut out simple requests.

Putting yourself into the customer's shoes can be an uncomfortable experience – what you thought was a good self-service portal might be clunky and difficult to use, or not actually meet customer needs today compared to when it was implemented.

Concentrating on what customers really want from self-service today can provide more ideas to improve efficiency and quality of service. Rather than looking at your own needs, you can tune your self-service by looking at this 'selfless service' model instead.

3. Can you automate more of your service?

Wherever you look, technology publications are writing more and more about artificial intelligence, or AI. Making systems smarter is the first step, but

helping them respond in context and to specific needs using AI means looking at things in more detail.

For ITSM, AI implementations should continue the process of taking more of the day-to-day requests and automating them. Services like chatbots have developed from simple menus through to being smarter systems that can automatically bring in appropriate content like FAQ documents or specific resolutions, or automatically bring in a human agent to deal with a more challenging problem.

Most importantly, it's worth looking at how to automate improvements to the service itself. This involves reviewing how you gather information on trends or issues, and then using this data to target areas for improvement. In using AI, the aim should be to find areas where automation can be applied across more areas of service as this will improve your efficiency.

4. Can you make your ITSM install easier to use?

Having just stated how important it will be to look at automation, it's also worth looking at what you can do to support your human agents in being more productive. This means looking at the processes that you have, and the user interface that people interact with every day.

Just as your users will have higher expectations of your IT service tools, so will your agents too. While they might be familiar with your ITSM installation, are you on the latest version, and are there shortcuts that you can take advantage of?

Looking at how to make your implementation run more efficiently can provide a better user experience for both users making requests and for the agents supporting them.

5. Can you prepare for the forthcoming changes to ITIL?

One announcement that all service teams should be aware of for 2018

NEW YEAR RESOLUTIONS FOR SERVICE TEAMS

Continued from previous page

concerned the IT Infrastructure Library, ITIL. Axelos (the organisation behind ITIL) announced that it will be releasing an update called ITIL X in 2018.

This will be the first major update to ITIL since 2011, and will include research on current ITSM implementations and technology best practices. Using these recommendations from ITIL, service desk teams can look at how to provide the best levels of support to the organisation.

This will be a good opportunity to revisit some of the principles that ITIL is designed for, from understanding business objectives and goals through to how IT services can meet those requirements. As more and more

company leadership teams talk about digital transformation and becoming more agile in approach, the new version of ITIL will have to help bridge some of these gaps.

In the meantime, it's worth looking at how your organisation is thinking about digital services and using online channels. For housing providers, these channels may be great options, and with more people preferring online channels to in-person or phone contact, they will continue to grow in usefulness, but they won't ever replace human interaction completely.

In 2018, you can improve service delivery through automation, through use of new technologies and through thinking

about service in new ways. However, these resolutions should be in service of a wider goal for the organisation. By balancing new approaches and your user priorities, the beginning of 2018 should be an exciting time for ITSM.

Simon Johnson is the UK & Ireland general manager for Freshworks.

SOVEREIGN WINS FIVE-YEAR CONTRACT AT EASTEND HOMES



Eastend Homes has awarded a new IT support contract to Sovereign Business Integration Group for the next five years.

The contract is based on Sovereign's managed IT services, and includes 'as a service' options for back-up, disaster recovery and firewall security.

John Henderson, managing director, Eastend Homes, said, "We are well aware of the cyber-attacks and data breaches that have been suffered in our sector. As well as wanting to make sure that we have the right IT systems and processes to support our customers, we also need

to make sure that we are at the forefront of data security to protect their personal information."

CASTLE DR AT MELVILLE HOUSING

Melville Housing Association is using Castle Computer Services for its disaster recovery and business continuity operations following a recent office move.

Andrew Noble, chief executive, Melville Housing Association, said, "Our infrastructure was at an age where it needed to be

upgraded in advance of our move to new offices and Castle worked with us to ensure that the upgrade and the move was as efficient as possible.

"Castle helped us with the preparation and planning so that the new infrastructure was installed ready for a 'pick and lift' on moving day. The

planning paid off because we moved over a weekend and had all of our IT systems up and running by Monday lunchtime, causing minimum disruption to our services.

"All of our hardware is located on one site and despite off-site data backups every day, we wanted a more flexible and robust DR solution.

Castle's 'disaster recovery as a service' (DRaaS) provides robust business continuity so that we can have systems up and running within hours if there is a critical event, giving us peace of mind that even in the worst case scenario we can still operate from anywhere and maintain customer service, even from home, within a few hours."



HOUSING PROVIDERS STRUGGLE WITH DATA, PAYMENTS & MOBILITY

According to research from Phoenix Software and VMware, UK housing providers are struggling with how they handle data, tenant payments and remote working.

The software providers' research found that 75 per cent of housing providers don't think their organisation is effectively using the information it stores, with almost 50 per cent expecting to need to refresh their current data storage capabilities within the next two years.

Phoenix and VMware reported that, with the introduction of universal credit and welfare reform, at least 10 per cent of housing providers are still struggling to manage tenant payments and over a third have difficulties gaining a holistic view of their payments.

Two-thirds of the survey's respondents said that their organisation failed to provide the necessary tools needed by remote workers, in particular citing a lack of access to business applications (47 per cent).

Greg Dean, sector sales manager for housing, Phoenix Software, said, "Many housing providers recognise the need to change and are already reimagining processes to adapt how they can serve tenants better. IT investment should centre around continual digitisation and mobilisation, focusing on maximising the value they extract from their data to deliver better experiences."



Housing Support Pro at Catalyst Choices

Warrington Borough Council's Catalyst Choices care provider is now using Housing Support Pro's software to streamline its support services.

Although it is a newly-formed community interest company (CIC), Catalyst Choices inherited from the council a traditional business structure in need of modernisation and with fixed resource patterns.

David Osborne, CEO, Catalyst Choices, said, "I knew we had to look at our employment practices, skills sets and support services including HR, financial services, payroll, administrative systems, productivity, performance information and technology base."

Housing Support Pro was chosen to transform Catalyst's existing IT infrastructure and systems, reduce operating costs, and identify and implement innovative business solutions. Housing Support Pro began by carrying out a review of the existing IT infrastructure, as the basis for reducing support service costs, creating a platform for engaging remote sites

and employees, and establishing a new business partnership model.

Housing Support Pro provided Catalyst with a fully managed IT service, covering software, hardware and support. Using its procurement expertise, Housing Support Pro also identified systems that met Catalysts requirements and would make financial savings.



Housing Support Pro helped Catalyst migrate its payroll and HR from the council's previous systems to a new Sage HR and CRM system. The software provider also enabled the internal sharing

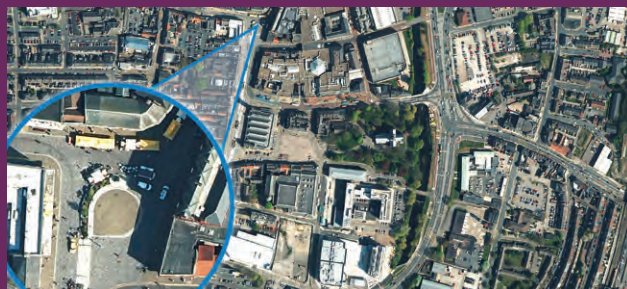
of documents to become more effective by introducing a SharePoint intranet integrated with Office 365.

Following the introduction of these new IT systems, Catalyst has brought a number of services in-house. For example, absenteeism can be reported to the board and the business development director now has more detail to provide a more commercial approach to customer enquiries.

Osborne said, "Our IT plan with Housing Support Pro has been about taking back control from Warrington Borough Council and making our IT systems work better to match our aims.

"Housing Support Pro's solutions offer tangible financial benefits; the biggest saving has been in improved systems, productivity and effectiveness as we no longer have to go through a third party to resolve any issues."

DARLINGTON MAPS HOUSING GROWTH WITH BLUESKY



High-resolution aerial photography from Bluesky is helping Darlington Borough Council to locate and identify previously undeveloped land parcels, producing maps for acquisitions and disposals, right-to-buy and tenancy agreements, way leaves and easements. Used in combination with GPS surveying, the Bluesky photomaps provide comprehensive ground detail, are up to date and accurately match the council's Ordnance Survey mapping.

Ross Harwood, estates technician, Darlington Borough Council, said, "For the past few years, Darlington has been a hive of building activity, and we realised

that our previous aerial photography was no longer accurate due to substantial changes in the built environment. Recommended by fellow local authority technicians and buoyed by the fact that central government uses the same data, we engaged Bluesky to secure up to date coverage."

The council currently uses the Bluesky data to map out proposed developments, including land ownership and potential constraints, such as conservation areas and Civil Aviation restrictions. The data also helps identify underground features, evidenced by earthworks or ground disturbance, and grid locations can be

extrapolated from a variety of other sources, including Highways Agency data, architects' plans and the Land Registry.

Harwood said, "The Bluesky data allows us to produce and share the exact location and extent of proposed development sites and demonstrate how the area will change and progress over time. These visuals really help our engagement with project partners and council members, providing a realistic view and not just a simplified map coverage."

ENFIELD'S AMBITIOUS GROUND-SOURCE HEATING PLANS

Kensa Contracting has won a deal to deliver England's largest shared ground loop heat pump system. 400 flats in eight council blocks in Enfield will be retrofitted with Shoebox heat pumps from Kensa Heat Pumps and connected to the largest collection of district arrays of its kind.

Planned for completion in October 2018, the heating upgrade is expected to result in residents' energy bills falling by 30-50 per cent.

Dr Matthew Trehwella, contracting director, Kensa, said, "This project is an excellent example of how district heating can be rolled out using the shared ground loop system architecture. Shared ground loop systems can be featured in developments of just two properties (micro-district), while this



project clearly demonstrates how the concept can be scaled up to much larger systems.

"Not only do ground source heat pumps provide the lowest cost heat, they also deliver substantial carbon savings, and landlords benefit from the exceptionally low servicing and maintenance costs."

The district ground source heat network system at Enfield will feature 16 shared

ground loop systems serving the eight tower blocks. Each district system will typically consist of clusters of eight boreholes serving individual heat pumps installed in the flats of half a tower block.

This system architecture allows each resident to select their own preferred energy supplier to access the best available electricity tariff. The shared nature of the ground array design also reduces drilling costs (typically the most expensive part of a ground source heat pump installation) and ensures funding through the Energy Company Obligations (ECO) scheme as well as the government's Non-Domestic Renewable Heat Incentive (RHI), securing Enfield Council quarterly payments for 20 years.

Clearer performance at Welwyn Hatfield Council

Lucy Aston, Business Excellence Manager, Welwyn Hatfield Borough Council



Welwyn Hatfield Borough Council has deployed reporting and performance management software from Clearview to give the council a more transparent and joined up approach to project and risk management and capture its strategic objectives and goals.

Lucy Aston, business excellence manager, Welwyn Hatfield Borough Council, said, "The new Clearview system will make sure our performance and risk management framework ties in with our corporate objectives, placing ownership in the hands of the managers actually responsible for delivering the services."



USING DATA TO PUSH THE BOUNDARIES

Douglas Silverstone (L), Head of Data, Thames Valley Housing, and Michael Hiskey (R), Chief Marketing Officer, Semarchy

In today's interconnected digital world, housing providers' boldest and smartest innovations are in data management, according to Thames Valley Housing and Semarchy.

Challenges in housing

What are the biggest challenges facing housing providers today? Is it keeping properties safe and residents healthy? Is it complying with government regulations? When and where to build new properties? Staying aware of commercial opportunities? Developing employee performance and leadership skills? Planning and innovating for the future?

According to a recent report from Call of the Wild, it's all of them. In a dynamic market and interconnected digital environment where change occurs on a daily basis, housing providers need to be quick and agile, whether they're responding to resident issues, pouring over new regulations or identifying potential revenue streams. The task is daunting, but it doesn't need to be difficult, as long as companies understand the one key issue that underpins every single challenge - data management.

Why is data important to Thames Valley Housing?

In order to provide a smooth service for our Thames Valley Housing residents, in an environment where there are a myriad of organisations and individuals supporting them, everyone needs to be clear about the latest interaction as well as historical data, from identifying potential problems, managing repairs, communicating and implementing regulations and managing financial information. Good data management is about ensuring all that information is in one place and making sure it is up-to-date, comprehensive and interactive. At Thames Valley Housing, we manage

and administer around 16,000 properties across London, Middlesex, Berkshire, Surrey, Hampshire, Oxfordshire, Buckinghamshire, Wiltshire and Sussex, and have over 1,000 properties under construction. With such a wide geographical area and huge variety of needs, we have thousands of data interactions every day. Poor management of these interactions and the data from these can lead to huge inefficiencies, high costs and dissatisfied residents. Good data management makes for successful communications for both the short and long term. That is why it is a key priority for us.

The problem of disorganised data

A few years ago, we came across a fairly common problem. Many of our estates have services delivered by management agents, and when it came to areas such as repairs we were becoming increasingly unable to understand our responsibilities versus those of our agents. When a resident noted a leaky pipe, for example, who fielded the request, who organised the repair, and who paid the cost? It was the same with a repair in a communal area; if we wanted to fold the cost into a tenant's service charge, we had to ensure that the managing agent wasn't responsible and therefore hadn't already made the charge.

In both examples, it's easy to envision the problem in human terms, as isolated issues of miscommunication and misinformation; doing so allows you to rationalise unfortunate events with the facts that everyone makes mistakes and that issues are often easily rectified. But a deeper survey revealed that these were data problems that offered no easy answers. By retracing the chain of command, we discovered that the breakdown was due to our slow and obtuse data infrastructure. Critical

information got held up in the system, did not or could not reach the right person, or found its way to people unable to do anything with it. In some cases, our staff often had to manually refer to legal documentation and leases.

That's what happens when agent responsibilities change estate by estate and recharging arrangements are equally varied. And it's a major problem. As a recent report, 'Crackdown on unfair managing agents', from the Department for Communities & Local Government explained, solving a housing issue in a fair and timely manner that empowers consumers requires navigating a complex system of regulations and dealing with often illegal agent practices. In response, the DCLG plans to create a fairer property management system, which could help to reduce the £700 million-£1.4 billion that DCLG's researchers estimated is lost every year due to superfluous service charges.

These charges are something we experienced at first-hand. Sometimes we would end up spending money on projects that were ultimately an agent's responsibility. But the costs were broader than that. For instance, because residents would sometimes have to wait for a long time while we uncovered the responsible party, we would experience ruptures in customer service, our reputation with residents suffered, and sorting through the issue made us fall behind on internal processes such as long-term planning, something that should be totally unaffected by the repairs part of the company.

Dealing with data's immensity

At a time when 90 per cent of all UK adults are internet users (including 83 per cent of low-income people) and 90 per cent of UK adults aged 16-75 are daily smartphone users, nearly every rule, regulation, and conversation relevant to

USING DATA TO PUSH THE BOUNDARIES

Continued from previous page

business can and will be encoded as a bit of data. A housing provider like Thames Valley Housing collects and monitors thousands of data points each day.

They aren't just raw, relative numbers; they are the representation of our entire organisation, from management to operations to logistics. And they have the potential to grow exponentially, as the internet of things (IoT) enables the real-time collection of data from boilers, drones and other sensors. Of course, IoT data won't be valuable until it has surmounted the twin problems of abundance and integration with existing data architecture. To do that, housing providers will need a high level of data clarity, something that can elude systems predating the digital evolution.

For us, leveraging xDM, the cutting-edge intelligent master data management (MDM) solution from Semarchy, has allowed us to keep pace with trends and position ourselves for the future. xDM increases our flexibility by focusing on data quality as an asset. That reduces our dependency on applications (they come and go as the business needs) and increases our ability to pull out and serve up good data just in time for it to be consumed by the business.

Integral to this process is the ability in xDM to categorise data, so that essential data can be guaranteed to certain quality levels, while informal data can be dealt with more flexibly. Doing this means our business focuses on the data sets that matter without losing the ability to absorb new data quickly. It's a boundary-pushing innovation in data architecture and governance, and the pay-offs have been enormous.

The failure of band-aid solutions

Dealing with serious data issues is tricky, because there is always tension between quick fixes and long-term solutions. Resident problems take priority, because they are issues affecting our most valuable assets. If they're unsatisfied with anything, we want to be able to help them immediately. But we also have to be able to properly evaluate the severity and responsibility of their problem and put in place realistic expectations.

Taking short-term measures, such as adding new workflow processes, we

were relatively ineffective. Agents that needed to communicate with the repairs team would often operate outside the new channels, choosing instead phone or email, as was their habit. The work got done, but we had no way to track or monitor its status, and thus no way to use that information in process evaluations and analyses. The incomplete data was like a black hole in our operations. We needed a full information overhaul that would give us a single system catering to the pan-organisation needs, such as housing officers spotting potential problems and developers predicting the optimal time and place to build a property to meet community needs.

An overhaul with MDM

Like other regulated industries (the NHS, financial services, etc.), our information framework is risk-management. 'Getting our house in order' initially required the establishment of a governance framework to explain how we would assess and manage information, with regard to policies, standards, procedures, taxonomies, and outputs, such as training, guides, and third-party agreements.

By creating data asset categories and assigning them owners, we were able to account for each piece of data. By prioritising data quality, we could set clear data targets, such as having email addresses for 80 per cent of our residents. This put us on the pathway to developing a 'totalising future' for data, meaning that there would be an information strategy for everyone in the organisation, so that responsibilities would be known, and the right person would have the right data at the right time.

This was possible because we overlaid xDM on our existing system. Doing this ensured that all business-critical data had a defined source and a clear meaning. With data ownership clearly defined and managed, we could open and close new data sets as necessary; Semarchy's solutions are agile enough to flex as our business practices evolve. This is one of the most critical aspects of the entire overhaul; across the entire organisation, MDM became the door through which all data had to pass in order to be ordered, incur meaning, and contribute value.

With xDM in place, we have the base to pursue more sophisticated value-driven data projects, such as building a data lake, where all raw data is stored in native form with a flat architecture, rather than in files and folders of a hierarchical system, and receives a unique identifier with extended metadata tags, facilitating the easy queuing of relevant data. We can also decouple our core business systems from our data and cut down from roughly 40 applications by deploying applications across core businesses processes and a combination of software as a service (SaaS). In finance, for example, we can create one core application covering processing, ledgers, forecasting, supplier management, payments, and reporting. And for customers we can feed information through a single CRM system, consolidating contact centre automation, marketing automation, salesforce automation and customer dashboard data.

Housing data for the future

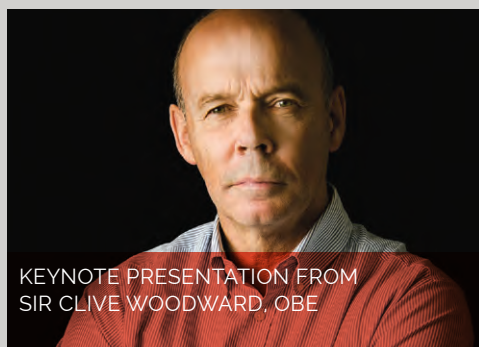
If housing providers want to succeed, they need to grasp that, in a digital world, their operational base is their MDM. Not only will it help them smooth communications with agents, but it will help them discover insights about themselves and their clients, make predictions about the future, and receive general recommendations. This can only happen, though, by embracing the latest and smartest analytics: autonomous or semi-autonomous data science. Techniques in this realm include data and text mining, machine learning, pattern recognition, and forecasting and visualisation. But, like the details of fixing a leaky pipe, they can only be effectively deployed if they have reams of clear, ordered data.

We may be drowning in data, but the answer is not to drain the ocean. It's to learn how to swim, and get a better boat!

Douglas Silverstone is head of data at Thames Valley Housing, and Michael Hiskey is chief marketing officer at Semarchy.

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Accent Group: People, data and things - Why your ICT strategy isn't working

Accuserv & Your Housing Group: Don't put a digital face on an analogue body

Acutance Consulting: Transforming pre-tenancy in a digital world

Brighton & Hove City Council: IoT - Using sensor technology to measure building performance

Bromford Group: Business strategy - Helping organisations unlock digital and agile

BT: How do we drive Digital Transformation?

Capita: An AI-enabled world of housing: Skynet or Robotopia...?

Castleton & Housing Solutions: A true technology partnership, driving change and delivering innovation

Catalyst Housing: Architecting the GDPR-ready enterprise

Civica: Presentation details to be confirmed

Clarion Housing & CHS Group: 4G and five years in Fenland

Cloud Dialogs & Homes for Haringey: A dashboard revolution

Coastal Housing: Mindset shift - The people stuff

Colne Housing: Managing the managed service provider

Engage Property Technology: Stop focusing on your staff and start looking after your customers!

Flagship Group: How we learned to stop worrying and start changing

Futures Housing Group: Operating model disruption and the journey towards an agile organisation

GreenSquare Group: Moving DR to Azure Site Recovery

Hightown Housing: Implementing systems in a non-perfect world

Hitachi Solutions Europe: Are you looking beyond just new software?

iomart: How to kickstart your journey to Microsoft Azure

Link Group: Facing the challenges of a digital world

Mobysoft: Best of Breed Applications vs HMS

Northgate Public Services: Presentation details to be confirmed

Orchard: Data-driven housing - Unlocking the power of data science

PowerObjects, an HCL Company: Maturing the commercial business model in housing

RackSpace: Presentation details to be confirmed

RHP: The evolution of the goldfish...

Soha Housing: Procuring and implementing a new system

Southern Housing Group: Presentation topic to be confirmed

Sovereign Business Integration Group: Migration to Azure 365

Trafford Housing Trust: The future is now

TSG: Supercharge your Office 365 investment - What are you missing out on?

United Welsh: What does the housing provider of the future look like?

Upstream Works: Building the capabilities for next generation omni-channel CX

Wales & West Housing: Keeping the plates spinning - The impact of the move towards greater IaaS and SaaS

Wrekin Housing Trust: Mind the skills gap! An alternative to the struggle of the IT skills hunt - growing your own

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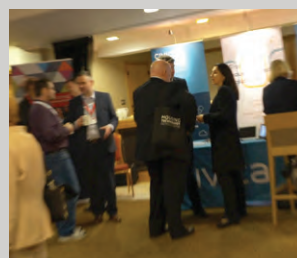


"May I just say how much we enjoyed the conference this year? The speakers were excellent, the topics diverse and we got a lot out of it."

WELLINGBOROUGH
HOMES

"We were very pleased with the event and are already looking forward to participating next year."

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"The conference has cemented our commitment to the housing sector – congratulations on another successful conference."

RIVERLITE



DUAL CERTIFICATION FOR FIRE AND SECURITY

Colin Walden, PR & Communications Manager, Secured by Design



This article explains how Secured by Design, the national police crime prevention initiative, is working with companies to overcome the challenges of achieving dual certification for both fire and security at communal entrances to blocks of flats.

Secured by Design (SBD) has announced that doors that are described as fire doors, or where fire performance is declared or implied, are required to have third-party certification for both security and fire performance in order to achieve its Police Preferred Specification standard.

This means that to achieve SBD accreditation, products will need to be covered for both security and fire performance within a single technical schedule from an independent UK accreditation service.

Certification requires regular re-tests and production audits to ensure that product quality is assured and maintained over time and goes beyond the one-off testing required by 'Building Regulations - Approved Document Q (Security)' which became effective in England in October 2015. Companies need to be aware that Approved Document Q and Approved Document B (Fire) now carry equal weighting under building regulations in England.

The SBD announcement followed a letter from the Department of Communities and Local Government to chief executives of local authorities and housing associations in June 2017, which stated that doors deemed to be fire-resisting at the time of construction of the block would be satisfactory.

However, coming in the wake of the Grenfell Tower fire tragedy in London, the letter instructed, "Replace any non-fire-resisting doors (such as non-fire-resisting uPVC doors) immediately with doorsets that are third-party certified as providing at least 30-minutes' fire resistance."

SBD's chief operating officer, Jon Cole, said that SBD has taken a pro-active decision for dual certification as an SBD requirement going forward. He said, "The DCLG letter is a radical change and seems to remove the ability for a door manufacturer to declare fire performance against a Global Fire Assessment or a one-off Fire Test Report."

Although Part Q only applies to new-build developments in the housing sector, SBD has been working with manufacturers and fabricators in many other sectors, including commercial, retail, mixed use, transport, health, education, leisure and others, to overcome the possible conflicts between fire and security and bring them together.

It is a landmark change that has major implications too for the construction industry, local authorities and approved inspectors who all need to ensure that fire and security regulations work seamlessly alongside each other. In the housing sector, the fire and security regulations are most likely to come together in developments of flats, particularly on doorsets which give access to a main building, such as communal doorsets, a doorset from an underground car park, an emergency exit to an outside area or a doorset into a flat or onto a balcony. Both regulations also apply to student accommodation clustered into groups of bedrooms (similar to that of an apartment) where they share a front entrance doorset.

SBD, which has been a staunch campaigner for improved security in buildings for nearly 30 years, is keen to help all companies that want to achieve dual certification to do so, with some companies finding the challenges of achieving this goal more difficult and daunting than others.

One company that has been proactive in working towards and has achieved dual certification is SBD member company, Gerda Security Products.



Gerda has been established in the fire safety market, specialising in the housing sector, for over 20 years and was one of the first fire doorset manufacturers to achieve third-party certification for both fire and security across its various doorset ranges. Achieving both sets of certification has led to Gerda doorsets being used in various burglary prevention and fire safety programmes throughout the UK. Research and development are at the forefront of what Gerda does and the company works proactively with its customers to determine their exact requirements.

This forward-thinking approach has led to the launch of Gerda's new ACB product. This externally mounted access control box (ACB) is specifically designed for communal entrance doorsets in new-build, multi-occupancy residential accommodation. As well as limiting illegal access to buildings, the ACB enables the Fire Service to gain immediate entry by deactivating external and internal doors secured by electronic or electrical systems, using Gerda's specialised key management technology.

Please see www.securedbydesign.com for further information about dual fire and security certification.

Colin Walden is the PR and communications manager at Secured by Design.

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