



BUILDING HOMES
MAKING PLACES
ENHANCING LIVES

The Digital Tenant

On-boarding by default



Robert Stewart, Head of Design & Development



A word cloud of various terms related to digital tenant services, arranged in a circular pattern. The words are in different colors and fonts, with some being larger and more prominent than others. The terms include: development, Mobile-First, Self-service, API, Repairs, Ownership, 24x7, online, Nudge, Click home, Customer, Connect, Shared, rent, buy, plan, pay, lettings, experience, customer, Digital-Enterprise, strategy, Agile, Integration, and journey.

Growing portfolio = more digital tenants



- Manages over 44,000 homes
- Building 1,000 homes this year
- Targeting 1,500 homes next year
- GN Sign-ups Forecast:
For FY2019 = 1,350
For FY2020 = 2,250



Addiscombe Grove, Croydon

A ground breaking deal has been agreed to deliver a new 100% affordable housing scheme near East Croydon train station.

[Read more](#)



Cricketers Field, Staplecross

We're delighted to be delivering 10 much needed homes for affordable rent and Shared Ownership in the tranquil village of Staplecross in East Sussex.

[Read more](#)



Leon House, Croydon

The iconic Leon House building in Croydon has been converted into modern, professionally designed, light filled apartments.

[Read more](#)



The Forge, Bishops Lane,
Sussex



The Street, Sedlescombe



Rogallo Place, Horsted



Lettings Online

The User Experience



The Customer Journey





Home Services My Requests

Your housing application

Introduction Data Protection Declaration Main applicant Main applicant - Personal details Main applicant - Current address
Main applicant - Disabilities Joint applicant Household members About the household Form submission



✕ Cancel

Save

Next ➤

How to register and apply for housing



https://youtu.be/_nOxgUMBgzI

Application stage management



Dash

Home Dashboard Services

Lettings Kent - open stages

Lettings Kent - closed stages

RTB and VRTB Applications - Open stages

RTB and VRTB Applications - Closed cases

Show

10

All Stages

Search

Strict Off

Reset



Summary	Reference	Stage	Task Due Date	Case Start Date	Started	Actions
Mr Robert Stewart Nash Close, ME9 9	FS-Case-107067087	Application 1 check by lettings team	02/26/2019 21:43:32	02/25/2019 17:25:44	02/25/2019 21:43:54	Continue
Mr James Hunt 625 East Sussex, TN5 7	FS-Case-89606728	Orchard Tenancy Information	02/26/2019 15:51:54	09/26/2018 15:49:47	02/25/2019 15:52:15	Continue
Ms Jessica Testing	FS-Case-106976152	Orchard Tenancy Information	02/26/2019 15:27:38	02/25/2019 10:34:33	02/25/2019 15:29:18	Continue
Mr Joshua Testy 3A Bloom Grove, SE2	FS-Case-106968705	Application 1 check by lettings team	02/26/2019 10:19:37	02/25/2019 10:10:35	02/25/2019 10:19:53	Continue
Mr Paul Wickert 13	FS-Case-95053135	Orchard Tenancy Information	11/10/2018 14:25:43	11/09/2018 13:46:05	11/09/2018 14:25:55	Continue



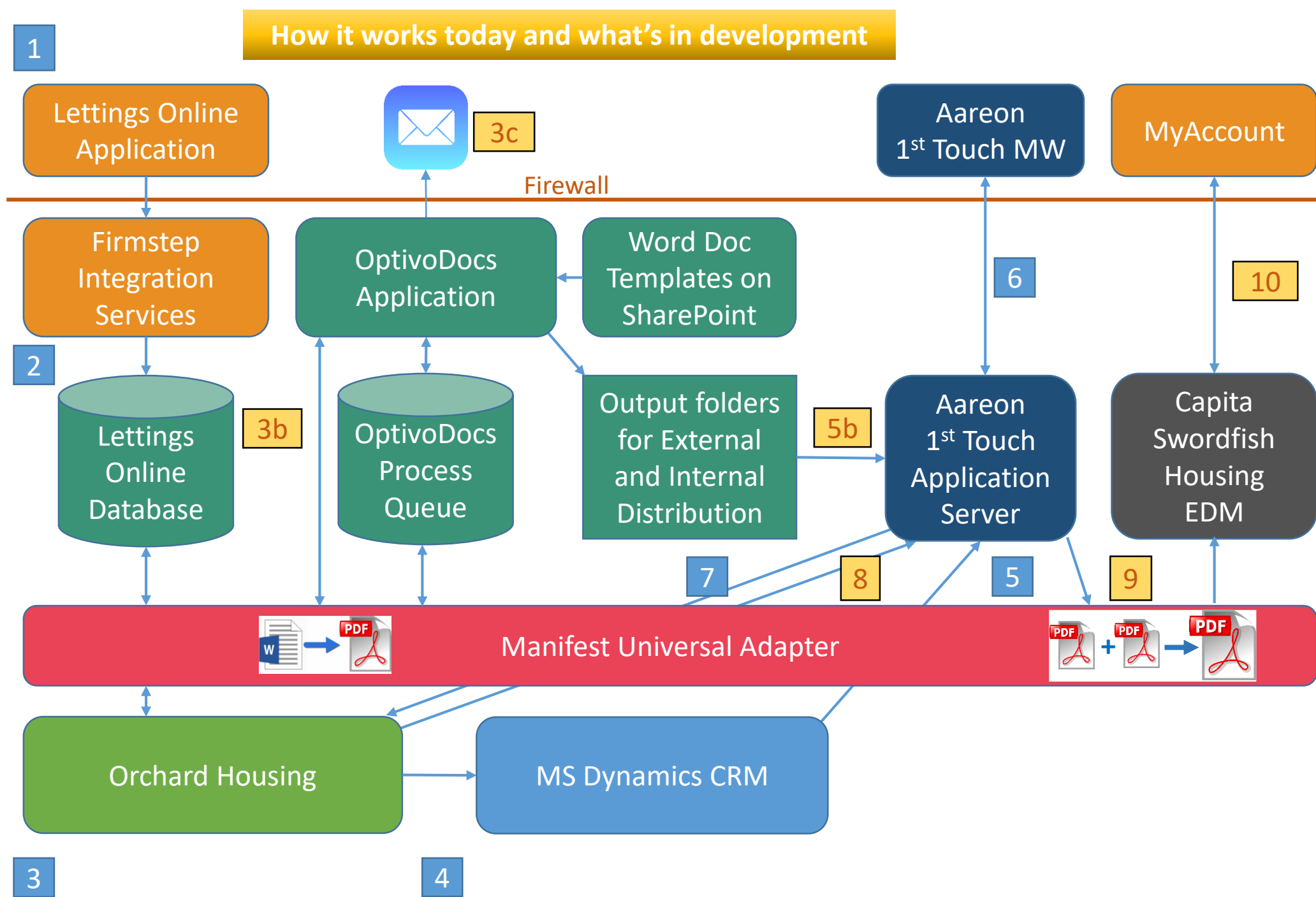
How it works
& how we built it

Live Stages

1. Application process
2. Offer accepted
3. Application in Orchard
4. Lead Applicant in CRM
5. Sign-up data preparation
6. Sign-up visit
7. Application turned into Tenancy

New Stages (in dev)

- 3b. Docs produced
- 3c. Draft emailed
- 5b. PDFs loaded
8. Tenancy Ref
9. PDF merge and doc indexed
10. Docs online



We used Software and Solutions Provided by



Housing & Business Process Management System



MS Dynamics CRM,
MS Office and
MS SharePoint



Forms & Self-Service Platform
i.e. MyAccount and Dash portals



Mobile Working Platform



Integration Platform & Services



Solution design and development of the
Lettings Online portal,
Document Management production
and Mobile Sign-up form



Electronic Document Management System



Automated Document Production





Changes we've made to our templates

1. Before the project started
 1. Standardising clauses
 2. Reducing the number of tenancy types
 2. Split the agreement into 2 sections:
 1. Terms & Conditions
 2. Start Date and Signing Form
 3. Other alterations
 1. Take out the contents page (too fiddly to get right)
 2. Move the signature page to the end of the document (when combined)
 4. Create data place-holders and multi-record tables to handle:
 1. Household members
 2. Special terms and conditions
-



Some Facts

- 1. Uses Open XML (not MS Office InterOp)
- 2. Application code in C#
- 3. Able to do tables for multiples of records e.g. Special Terms and Conditions or Household Members
- 4. Microsoft does not support saving as PDF as a service
- 5. Used Manifest UA to convert docx to PDFs

Schedule 3: Special Terms and Conditions of Tenancy

- List of special terms and conditions

Schedule 3: Special Terms and Conditions of Tenancy

Schedule 1: List of Services

Eligible service charges	Amount
Comm bulk rubbish remove	£5.00
Comm pay phone	£2.30

Non eligible service charges	Amount
Cesspits - clean and empty	£6.00

An example of a Mobile Signing Sheet



Some Facts

1. It's an agreement for Former Tenant Arrears
2. Data is loaded from the Lettings Online Database
3. Used for arrears agreements since 2016
4. Agreement & signing form added to T&Cs to create a completed Tenancy Agreement

HO Sign Up

Agreement To Pay

Date:
27/02/2019

Account Reference:
Test A/c Ref

Former Address:
11 Gun Lane
Gravesend
Kent
ME14 4GH

The agreement is between Optivo and:

Tenant 1:
Ms Jo Testing

Tenant 2:
Mr David Testing

I/we agree that at today's date I/we have a debt to Optivo as follows:

Rent Arrears(£):
800

Legal costs(£):
300

Other

Total(£):

I/we understand that this agreement (or any subsequent variation agreed by Optivo and myself/orselves) to pay former tenant arrears/debts is a term of the tenancy agreement. If I/we do not keep to this agreement, Optivo may take legal action to repossess my home.

Tenant 1 Signature:

Sign here

Sign

Clear

Sign here

Previous

Done

The Digital Tenant: on-boarding by default



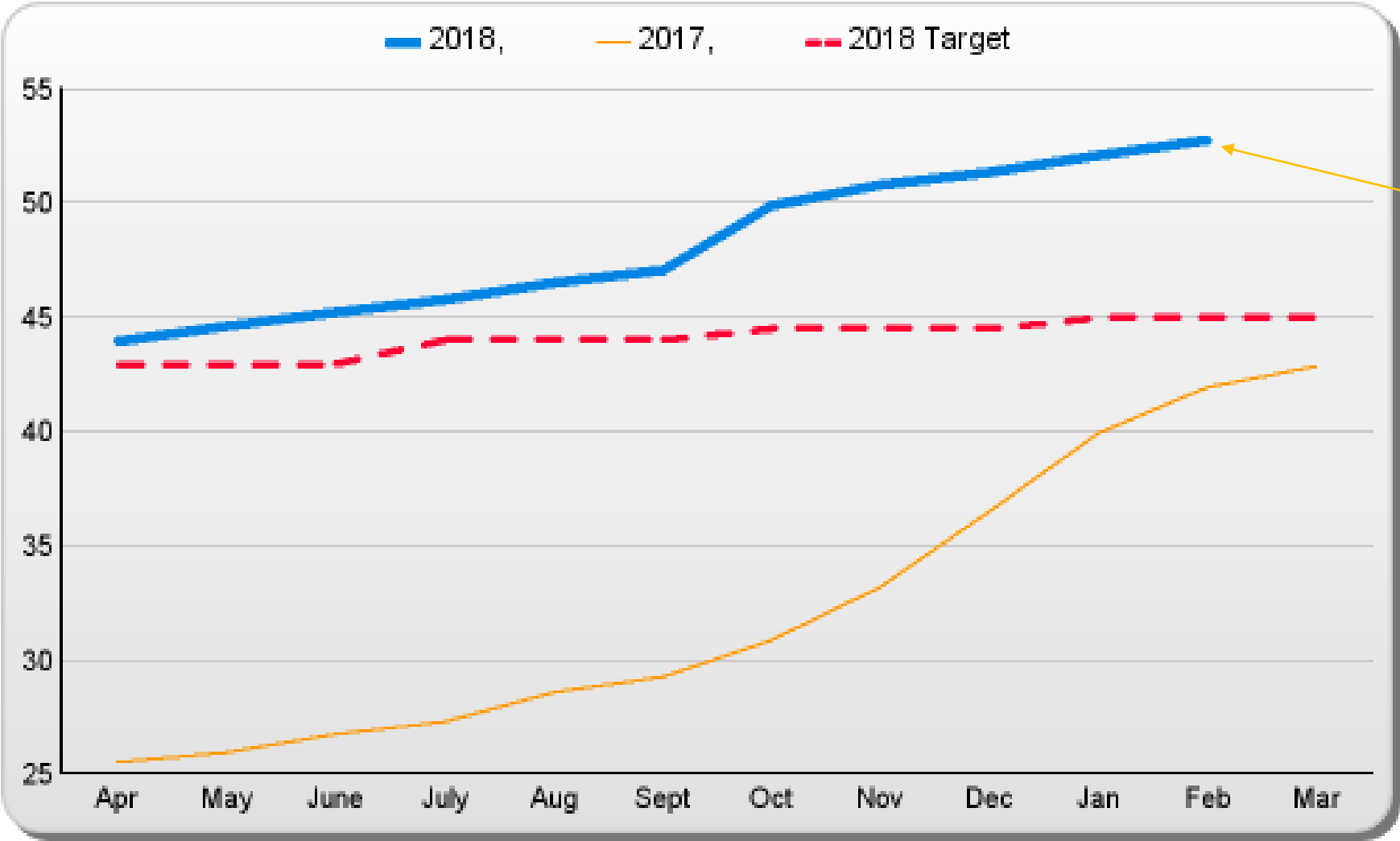
What we've achieved so far

Mobile Process for the Changeover of Tenancies



Visit Count		Column Labels												Grand Total
Row Labels		1	2	3	4	5	6	7	8	9	10	11	12	
1.	Orig. AmicusHorizon Now Optivo	HO Follow Up												3750
	2015	433	322	304	293	293	248	285	308	342	296	350	276	118
	2016	48	72	70	73	65	71	85	97	131	86	98	66	962
	2017	126	89	117	107	134	108	111	124	146	85	105	82	1334
	2018	131	95	117	113	94	69	89	82	54	108	113	77	1142
	2019	128	66											194
2.	Started in 2015 with Follow up & Pre-voids	HO Pre Void												1912
	2015	179	183	111	137	149	140	152	143	169	179	211	159	153
	2016	39	38	38	48	55	48	46	41	54	49	62	51	569
	2017	52	56	45	42	52	57	53	46	42	50	66	36	597
	2018	38	37	28	47	42	35	50	39	40	53	44	38	491
	2019	50	52											102
3.	Started Mobile sign- up in March 2016	HO Sign UP												3337
	2016	266	291	243	234	300	278	313	338	250	286	270	268	866
	2017			38	69	91	73	110	125	90	94	90	86	1114
	2018	85	85	113	91	91	96	107	138	65	72	87	84	1172
	2019	98	104	92	74	118	109	96	75	95	120	93	98	185
	2019	83	102											
4.	Mobile voids too	HO Tenancy Conversion												2123
	2016	289	143	150	166	221	164	166	174	116	191	203	140	219
	2017					1	12	25	31	25	39	57	29	853
	2018	59	43	82	91	106	62	74	90	56	56	66	68	884
	2019	106	57	68	75	114	90	67	53	35	96	80	43	167
	2019	124	43											
5.	At first, encourages residents to join MyAccount	HO Transfer inspection												279
	2015	30	25	30	17	19	17	15	29	20	22	29	26	30
	2016									1	5	11	13	131
	2017	7	10	13	5	12	13	9	15	14	10	13	10	60
	2018	7	6	7	10	5	1	3	9	5	4	3		49
	2019	11	5	10	2	2	3	3	5		3	2	3	9
	2019	5	4											
6.	Now automatically switches on	Grand Total												11401
7.	3,337 lettings completed Mobile of which 1,115 via Lettings Online	1197	964	838	847	982	847	931	992	897	974	1063	869	

Resident Households on MyAccount (Lead tenant < 70yrs)



52.76%
Feb 2019



What we have achieved so far

1. Digital tenants by default
 2. No more paper to take out
 3. Data quality improvements
 4. Time management improvements
 5. Sign-up meeting is a better welcome to Optivo
 6. Customer journey improved for the applicants and staff
 7. More efficiency with each release
 8. Getting stuff out there as soon as it is useful
 9. GDPR and data retention is well managed
 10. Better practice and processes
-



Some questions to consider



- | | |
|---|----------|
| 1. Did we need so many platforms and systems? | No but |
| 2. Did we need a mobile solution? | No but |
| 3. Would DocuSign or similar (e.g. UIPath) be better? | Possibly |
| 4. Is it safe to put your EDM system online? | Yes but |
| 5. Could we do more online and automate further? | Yes |
| 6. Do we need to meet people to sign them up? | No but |
| 7. Is MyAccount used by residents? | Yes but |
| 8. Do we delete applications when finished with? | Yes |
| 9. Could we have delivered this faster? | Yes but |

There are many more to consider...



That's all folks

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**Please start your email subject line with
HTC19**
