

Scalable mobile solution sees dramatic 50% efficiency savings for Moat



Moat Housing Association is based in the South East of England building high-quality affordable homes for those in housing need. They are proud to be one of the top 30 housing associations in the UK, managing over 20,000 homes spread across South East London, Kent, Essex and Sussex.

“To any organisations who use Microsoft Dynamics CRM, we feel Resco is the obvious choice”

Moat Housing Association

The Challenge

The ability to give frontline staff access to conduct their work whilst out in the field has long been a priority for Moat, but they found it a challenge to find the right solution. They started using Microsoft Dynamics as their core CRM system around four years ago and as such they have been looking for a fully integrated mobile solution.

RedKiteCRM Housing Management includes a number of modules designed specifically for the Housing Sector including rent engine, arrears management (forecasting, payment plans and technical arrears), and a service charge and direct debit module.

We work in close collaboration with our customers, to develop solutions designed by housing associations for housing associations.

Software and Services

- *Microsoft Dynamics CRM™ on premise*
- *Resco for Dynamics365*
- *RedKite CRM's Housing Module*

Like many housing associations their stock is widespread, and the staff had to prepare paper packs for visits, carry tenant data to site resulting in security concerns, and having to return to the office to write up visits and inspections.

Moat had some mobile capability via an application built inhouse, but it did not integrate with MS Dynamics, it offered limited functionality and the licenses were due for renewal in November 2019.

The Solution

It was around September 2018 that Moat engaged with RedKiteCRM who demonstrated the Resco mobile solution and its capabilities. Since then, with the help of RedKiteCRM, Resco has enabled Moat to consolidate their data into one secure, central system, giving visibility to the whole business. Paper based estate and property inspections have been digitised and housing staff can easily complete forms, upload photos and raise repairs with the data automatically flowing to Microsoft Dynamics in real-time.

Starter tenancy visits and tenancy audits have been digitised meaning meeting outcomes and actions are clearly logged and traceable in their core system.

They've enabled staff to manage Anti-Social Behaviour cases, log calls and visits, view customer and property data as well as receive actions from the monthly Fire

“Tenancy Audit visit time has reduced from 40 minutes to approximately 20 minutes and whilst an Estate inspection could take in excess of 1 working day without Resco the equivalent inspection now takes approx. 3 hours.”

Dani Copeland, Moat Housing Association

“Due to the extent we use Dynamics in our business for all customer-related communications, including extensive case management we found that synchronisation was an issue when we first rolled out. RedKite CRM supported us to resolve this by utilising the “Project” feature meaning we could restrict data for each staff member based on defined filters.”

Mark Rogers, Moat Housing Association

Risk Assessments conducted by their third party contractor, all via Resco, via their iPads.

Project Approach

With RedKiteCRM’s support, Moat have released two phases, each taking just five months to design and deploy. Phase 1 included branding Resco to include the Moat colours and logo, estate inspections, fire risk actions, repair reporting, ASB case management and access to basic customer and property information.

Phase 2 focussed on digitising more paper-based forms and bringing in functionality provided by their inhouse mobile solution including cleaning and gardening surveys and integration to their Proactis purchasing system. This allowed their Neighbourhood Response Teams to raise orders for materials, remotely, via Resco as well as managing their repairs.

Results and Benefits

Moat now has a mobile solution that is easy to use, available offline and allows frontline staff access to customer and asset information at their fingertips. The Resco solution has delivered a significant time saving including decreasing travel time and the length of various inspections and audit visits.

Benefits

- *Estate inspection time reduced from 1 day to 3 hours, 50% saving*
- *Property Inspection & Tenancy audit visit times reduced by 40 minutes to 20 minutes, 50% saving*
- *Travel back to the office to write up visit outcomes removed. Offices are not always local to our stock or staff homes so this can save anything up to an hour a day.*
- *Administration support to frontline staff to raise repairs reduced from approx. 1 hour to just 10 minutes a day*
- *FRA and H&S concerns flagged instantly*
- *GDPR issues around security of customer data removed as this is now all within a secure mobile solution and not paperwork*
- *License savings on previous mobile solution*

Having customer information available on a mobile device reduces paperwork and administration overheads and allows staff to react faster to issues logged in the field. Additionally, being able to upload photos to their CRM makes it easier to hold contractors to account when the need arises.

Tenancy audits and estate and property inspections are now completed via digitised forms, seeing the average duration of each visit drop by half. With further savings being realised by staff not having to spend time on preparing paper packs and returning to site to write up visits.

The Resco mobile solution is easy to use due to its similarities to Dynamics, which has meant Moat had the added benefit of requiring minimal staff training.

Looking to the future, Moat now plan to roll out Resco to other areas of the business with Property Services being the next area of focus.

About RedKite CRM Ltd

Based in rural Oxfordshire, RedKite CRM have extensive experience of implementing Microsoft Dynamics 365 (CRM) into the social housing sector. Get in touch to see how our specialist knowledge can support your organisation to achieve efficiencies.

About Resco

Based in Bratislava, Slovakia, Resco is a global expert on business mobility with products spanning various verticals, aiming to re-energize customer interactions through advanced CRM mobility. Get in touch to see how our product can help your organisation achieve efficiencies.



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