

Perception BI Builds Housing Management Portal



“Perception BI has many years experience in Housing Management, especially in the voluntary sector, where cost control is especially important. Management of rental income, maintenance costs, waiting lists and voids are key reporting areas which require day-to-day management.”

Company Background

Our client is a large social housing provider in the north of England, registered as a charity with the National Housing Federation.

With over 380 properties, covering 5 square miles and a waiting list of over 50 potential tenants, this organisation employs 22 full time staff to manage the day-to-day running of the business.

The organisation planned to take advantage of the weak housing market to increase their housing stock and improve their customer service.

Need: A Management Information portal, covering top-level dashboards down to transaction level reporting for CRM and credit control

With rental income of almost £300,000 per month and a maintenance budget of over £0.8m per year, control over revenue and cost are vital.

Rent / Credit Control

Payments are collected from various sources, including direct debit, housing benefit, credit card and cash/cheque payments.

The swift reconciliation process for payments is vitally important to ensure that tenants are not able to get into debt. This is especially important for low-income tenants, where Housing Benefit amounts may vary and shortfalls may need to be collected.

Managing bad debt takes many hours of work, and early identification reduced bad debt by 17%.

Contact us on: **0845 0945 821**
or visit www.perceptionbi.co.uk

Quick Facts

Industry:

Housing Management,
Charities

Needs:

To develop a Management Information portal which could cover the needs of various key business areas, including rent control, maintenance and waiting lists.

Solution:

KPI Dashboard and Reporting Tool, connecting to specialist rental control system and multiple excel spreadsheets

Key Benefits:

- A fully operational KPI Dashboard for Management Information
- Improved monitoring and control rental income and credit control
- Basic Customer Relationship Management solution
- Waiting List management
- Voids management

Voids

When tenants leave a property, it often requires maintenance work to be carried out. Not only is there a cost for the work itself, but whilst the property is empty (or void), there is also a loss of rental income.

Voids can often be planned, e.g. when tenants terminate their contracts. However, in some cases voids can't be planned for, e.g. when a tenant dies.

Our client had a budget of 4 weeks per year where the property could be empty.

Waiting Lists

A key factor in reducing voids is the availability of new tenants for the property.

At any one time, there are between 20-50 people on the waiting list, all with different requirements for properties including area and number of bedrooms.

In order to best match a tenant to an available property, it is important to be able to match their requirements. Being able to inform a prospective tenant early is essential in keeping voids low.

Maintenance

Management and reporting of maintenance of properties is absolutely vital, both from a cost and legal point of view.

Properties require both scheduled and ad-hoc maintenance, both important for ensuring a safe environment for the tenant.

Without proper management, maintenance costs can grow rapidly, quickly exceeding the 20% of rental income budget.

Speed of maintenance is also a key driver in ensuring that voids are kept low. Since it is often possible to know when a property will require maintenance, outstanding work should be an exception.

Policy Related	Year	2010	2009	2008	2007	2006	2005	2003	Total
SalesArea	Area 1 Scotland & RE	81	86	2	-	-	-	-	169
ProductType	Area 2 North & NE	217	194	13	3	-	-	-	427
Agency Related	Area 3 North West	132	170	11	-	1	-	-	314
Area	Area 4 West Mid & Wales	50	53	4	-	-	-	-	107
Agency Status	Area 5 Central & East	95	77	6	-	-	-	-	178
FSAS Status	Area 6 South West	89	74	2	-	-	-	-	165
Region	Area 7 South East	92	70	8	-	-	-	-	170
Region	Area 8 London	38	58	2	-	-	-	-	98
Region	Area 9 Central	128	99	15	-	-	-	-	242
Region	Area 10 North	67	100	13	-	-	-	-	180
Region	Area 11 South & SE	78	66	7	-	-	-	-	151
Region	Area 12 South & SW	32	47	8	-	-	-	-	87
Region	Area 13 Other	157	186	5	-	-	-	-	348
Region	Area 14 Other	196	184	41	-	-	-	-	421
Region	Region 1 Scotland & RE	78	80	21	-	-	-	-	179
Region	Region 2 North & NE	1	396	434	59	-	-	-	930
Region	Region 3 Central	914	990	140	-	-	-	-	2044
Region	Region 4 Southern	95	85	4	-	-	-	-	184

Total Policies: 35937
Total Policies on Risk: 23116
Total Cancelled Policies: 6776
Total Renewed Policies: 11082

Number of Policies Month to Date
Number of Cancelled Policies Month to Date
Top 20 Product Agents Month to Date
Number of Renewal Policies Month to Date
Cancelled and Live Policies with Ratio

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Solution: A Perception BI Project

After several meetings with Perception BI our client agreed to a pilot lasting 10 days.

Our Senior Developer initially developed a KPI dashboard to monitor levels of voids in the properties. This allowed our Business Analysts to work with the organisation to ascertain certain times of the year in which voids occur most frequently.

We have also added a rent control solution which has triggers to show when a tenant's rent account falls below a certain threshold. This is set to flag the payment type, for example housing benefit, so that the reminders produced clearly indicate whether the tenant personally owes money.

The payment reconciliation process, previously a manual process, is now fully automated, reducing the overall time taken to identify underpayments.

We have produced an application to match housing requirements with the expected end dates of tenancies. As soon as an agreement is ended, a search is conducted to find all potential candidates for the property so that they can be contacted.

For maintenance, we have produced a reporting model which can show the required regular maintenance of certain fixtures, for instance boilers. In addition, it can show the forecast and projected costs for a particular week, month or year.

The maintenance reports can also predict when work will need to be carried out, based on likely end dates of agreements. This allows for basic capacity planning to ensure that there will be sufficient maintenance staff available to complete work, keeping voids low.

A by-product of this development has been the ability to negotiate better contract terms with contractors, since there is an available estimate of time required.

Key Benefits: Improved Customer Service, Better Rent Control, Lower Costs and Accurate, Timely Management Information

Perception BI has improved overall Customer Service by providing the capability to quickly access customer information from various systems into a single page.

Perception BI has also allowed for better communication with tenants, from regular, up to date rent statements to earlier notice of routine maintenance visits.

Perception BI has delivered massive **savings in cost and time**, reducing the number of manual tasks involved in monthly reporting, from payment reconciliation to feedback reports to the National Housing Federation.

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Perception BI has also delivered **improved control** over the revenue and costs within the organisation. This includes management of voids, ensuring that maintenance is properly scheduled and that potential new tenants are identified in sufficient time to allow them to give notice on existing agreements.

The Complete Picture: Training and Development

As part of the overall project, Perception BI trained two key resources to develop and maintain the reporting models.

In addition, we developed a custom training programme, taking less than half a day to complete, for any new users.

One of our senior Consultants now spends two days per month on-site with the business to continue to support and develop the applications, handling new data sources, reviewing KPIs and answering ad-hoc queries from the business.

"We have connectivity, visibility and control. We can now make valid decisions, based on real data and analysis. We have a consultant on-site with us for at least two days each month to help develop the reports and ensure that the solution continues to meet our needs. This has not only been a valuable exercise, but a great experience for our business."

Director of Supported Housing



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