

CASE STUDY

PLATFORM HOUSING GROUP

Background

Natasha Morris is Group Income Services Manager for Platform Housing Group, one of the largest housing associations in the UK and the biggest housing association property developer outside London with over 48,000 properties.

Natasha heads up the income services team which is responsible for income collection including debt recovery and enforcement. There are 90 members of the team working in the East/West Midlands and across Lincolnshire half of the team are able to work remotely or from multiple office locations, the rest of the team have traditionally been office based.

The department also runs a small call centre which aims to resolve resident issues before they are passed to rent officers for enforcement action. The call centre handles 2,000 calls a week. There are 35 rent officers in the field with an individual case load of 1,000 properties.

The department had been producing all its own letters other than some of the automated stages which required standard letters which were bulk produced by a printer.

Approach

The business had explored the move to using CFH Docmail's hybrid print and post service but other business priorities had always meant it had never been adopted wholesale and had a patchy user base. Then Covid-19 and lockdown struck.

Natasha says 'The week of the 16th March we were clear that we were going to have to mobilise the business to work from home. By the 18th the process was happening organically. Half of my staff were used to operating in a home setting but for the rest it was a baptism of fire.

The first thing I did was to call Nicki at CFH Docmail and the rest is history. We'd had our first conversations in January so we re-engaged and got started again.

Docmail was going to be able to give all my team the ability to produce all the letters and documents they needed and send them in the post from their laptops at home.

I was also tasked with supporting roll out across the business. I knew I couldn't have 1400 employees bombarding me with emails so the focus was on training.

We began with the income team to make sure they were all conversant with Docmail and were confident users. We then revisited registered users across the business and created Docmail subject matter experts.

We identified any employees that had signed up but not used Docmail and focussed on quick wins. IT were also instrumental in setting Docmail up in the background on everyone's network so it was immediately accessible. This was a new development from having to raise a ticket for each user.

We selected 'subject matter' experts to work with other teams via Microsoft Teams to bed in Docmail and made one member of each team responsible for implementation and use. In the background Docmail's training team led by Jenny spoke to every user on a one by one basis to identify any problems. We talked to peers in other areas and developed an introduction to Docmail email which included all the links, a user guide and 'how to set up', we offered up 'super users' and the support structure.

Colleagues indicated interest and then the list was sent to Nicki and Jenny at Docmail to follow up with training. We encouraged colleagues to be self-starters and to set up with the user guide. We offered remote training with multiple daily slots, which was also useful contact for the teams who were getting used to working from home. We used Microsoft Online with realtime updating as we needed the flexibility as some staff were beginning to be furloughed.

It was a conveyor belt process but effective and championing the use of Docmail across the business

became a key part of my role in the initial weeks as users expanded. We have a company online learning management system and we had a meeting and took the Docmail user guide apart and set it up as one of our standard modules to create a long-term resource in the Learning Academy.

In all of this the Docmail team were 'second to none'. They were just there all the time, with rapid response on every question, I never wait more than 20 minutes for an answer to anything. They follow up to check understanding with phone calls and anticipate and offer help. They guided me through the whole process.

They provided complete and detailed management information which allowed me to provide an insight report to the Executive Team board with a company wide overview of use which didn't take a moment of my time. At critical points they were there to back me up.

We've now got 237 regular users and Docmail is being used business wide including: by the maintenance team for repairs and gas compliance appointments and HR.

Docmail is ideal for project specific requirements as well as day to day usage. We've proved that Docmail is a lifesaver when your team needs to work from home.

Key learnings and results

- You need a top down approach, Effective leadership is needed to ensure staff uptake and overall engagement; you often find that enthusiastic team members support other colleagues to become confident with the process too.
- Everyone can use this if you give them the right training - it's all available free of charge.
- Be consistent in the promotion of the use and benefits.
- As the department who championed the project, it's been a great success. This has helped to cement our reputation for finding better ways of working that can benefit the whole business. We procured, piloted and succeeded.

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