

# Digital Transformation...

VerseOne Group



# Chris Mounsey: Chief Product Officer



- Joined VerseOne in **April 2008** as a website designer
- Various roles, but **product designer / strategist since 2010** (reporting to the Product Board)
- Current responsibilities: **product specifications, solution specifications, interface design, process analysis & definition, technical engagement & definition, and more...**
- ... essentially a **solutions architect.**



# Agenda ~ 20 minutes

- **Digital Transformation** ~ 4 minutes
- **Portals: a step along the way** ~ 12 minutes
- **VerseOne portal solutions** ~ 3 minutes
- **Summary** ~ 1 minute
- **Q & A** ~ until the guillotine falls!



A fully digitally transformed organisation is streamlined, with fully aligned **culture, business processes,** and **technologies** to enable it to derive maximum value from its most valuable asset—its business content.



# Drivers of Digital Transformation

- Customers and employees are becoming **more demanding and tech-aware**
- The **number of contact channels** is increasing
- There's an **explosion of content**
- Everyone expects a **fast, personalised and consistent service through all channels**
- **Shifts in working practices** are blurring the lines between corporate and personal access
- Resources are becoming **more restricted**





# What are we trying to achieve?

- Customers want to **go online, login** and **use their stuff**
- Customers **shouldn't have to worry** about any of the technical challenges (or security)
- Customers want an experience that is **quick, reliable, and personalised**
- **Make live easier** for your teams
- More **efficient use of resources**



# Digital Transformation is difficult

- Lots of line of business systems (LoBS) that **don't talk to one another**
- Systems **manage identity** in different ways
- Need to be able to have **multiple methods of communicating** with LoBS
- **Processes not aligned** with expectations
- **Teams can be wary** of having to “learn another software system”
- Often faced with **huge volumes of data**



# Self-service Portal

A step along the road...





# Business Case KPIs

- Do you know **how many** calls and emails do you get?
- Do you know the **percentage topic split** of those calls?
- Have you designed your portals services **around these topics**?
- Have you quantified rough costs per hour, and **how much you expect to save**?
- Can you save money on **licences** or **training**?



# Single Customer View

You can securely view all of the data about a particular customer **across all internal systems**.

**The customer can securely view data** that you hold about them across all internal systems.

Both you and your customer can **securely leverage this data** to provide beneficial outcomes.

- If an interface is **so simple** that your customers can use it, then your customer service teams can too



# Portal Requirements

- **Brand trust**—your portal should mirror your website design or, better, be fully integrated into it
- **Flexible**—driven by a fully featured website publishing system, for complementary features
- **Responsive**—accessible on desktop and mobile devices
- **Security and Data Protection (GDPR)**—a products must be “*secure by design*” (issues fixed quickly)
- **Functional out of the box**—use designed for purpose products
- **Multiple data sources**—perfect for that merger...



# Preparation

- **Audit your processes**—are they suitable for a portal?
  - The actor in a portal is a **person**—not a property!
  - Get a process analyst or technical consultant in to help you, if you need it
- Do you **understand the pain-points for your CSAs?**
- Do you know **what your stakeholders want to do?**
- Do you *need* **all of those SoR codes?**



# Basic principles of API Portals

- **Maintain your “single source of truth”**, e.g. your Housing Management System
- Your portal can be configured to **make things more understandable to your customers**, e.g. monthly over weekly statements, rent balance credit / arrears
- Your back-office systems need **Application Programming Interfaces (APIs)**...





# APIs—making it work

- **API**—Application Programming Interface
- APIs enable us to **read from—and write to—software systems in real time** *whilst obeying all of the rules of the system*
- **Web Services**—a type of API that enables us to push and pull data securely across the internet *without having to be inside your secure network*
- APIs / Web Services enable us to provide **an intuitive interface to your back-office systems** and provide a method for those systems to exchange data





# Common issues

- **Data is not clean** / accurate / up to date, e.g. DoB 01/01/1900
- Data is **not properly defined** or designed, e.g. columns change, arrears and credit
- APIs are **not accessible outside your network**
- Users have **multiple tenancies**, e.g. house and garage
- **Leaseholder accounts** behave differently to tenant accounts



# Ready to start...!?

- **Business Case** written
- **Solution Specification** defined
- **Budget** allocated
- **Teams** bought in
- **APIs** licensed
- **Supplier** engaged



# Wait!

What else can you automate or crowd-source...?



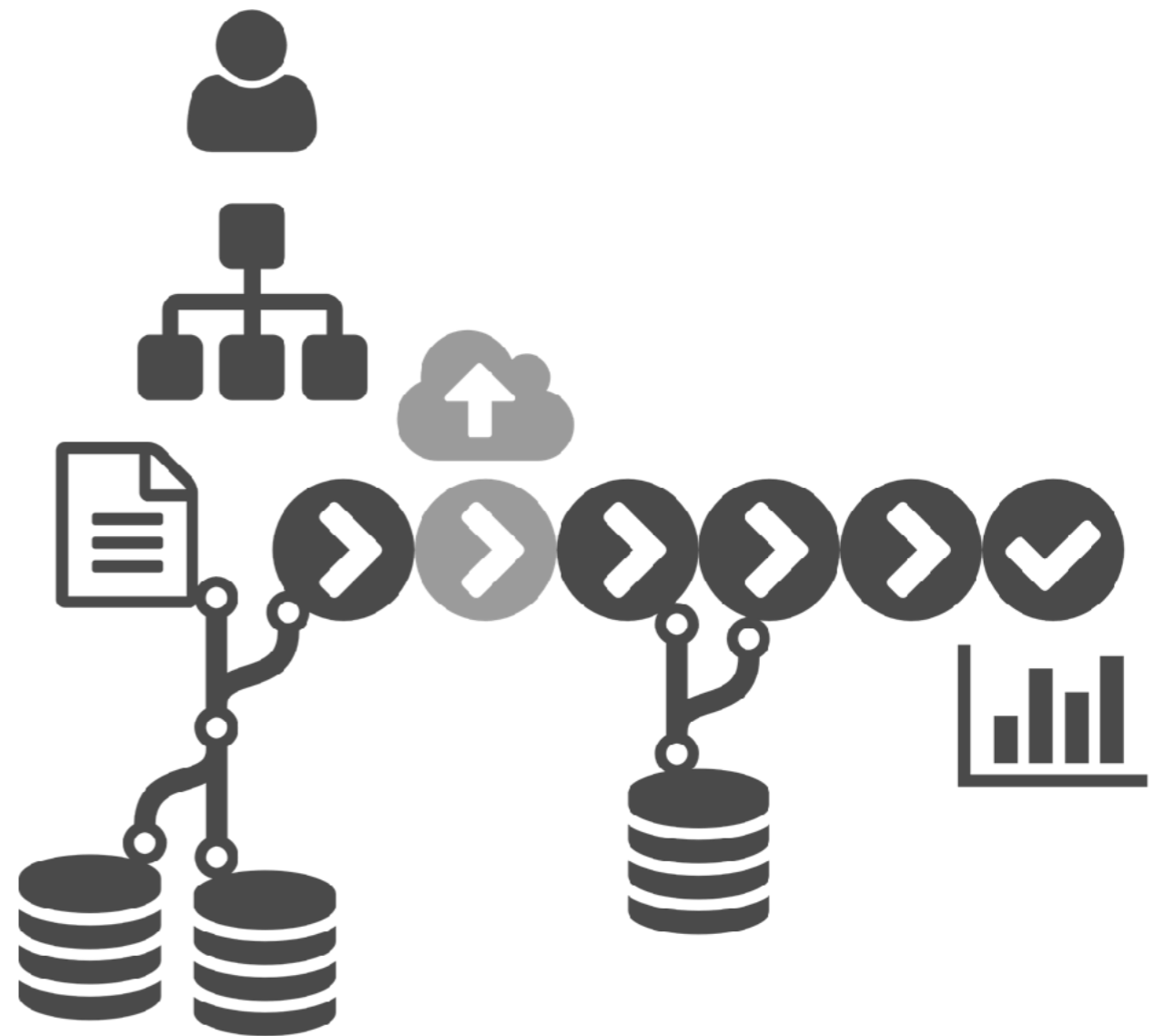
# Ask your CSAs and income teams (really)

- **Income / expenditure forms**—a 50 minute phone call to fill in an Excel spreadsheet could be maintained by your tenant
- **Branded payment gateway**—and use tokenisation to “remember” payment details
- **Triggers to send reminders**—“your UC payment is due tomorrow: don’t forget to pay your rent”
- **Digital Tenancy Agreement**—use forms and PDF combination to generate signed documents



# Business Process Automator (BPA)

- **Process “steps” can present actions**, e.g. eForms, secure file uploads, API inter-actions
- Users have **visibility of progress** and can interact where required
- CSAs can be given **guidance notes within the process** to lighten training overheads
- **Auditable decisions** for compliance





# From home-seeker to tenant—online...

- **Display available properties** and / or waiting lists
- **Process tenancy applications** through BPA...
- ... including **sustainability tests** and **deposit payments**
- **Secure upload** of documents, e.g. ID documents, mortgage letter of intent
- **Start a tenancy** in your HMS
- The successful applicant is **automatically converted to a tenant portal user** on completion
- Support your tenants with a **Portal Management Toolkit**





# Leverage the “robotic workforce”

- **Tenancy Application Process**—and don't forget Voids, Shared Ownership, and commercial lettings
- **Tenancy Termination Process**—quick and easy to guide tenant and CSAs through the process
- **Automated Arrangements**—e.g. if less than £500 is owing, let the tenant set up an arrangement automatically
- **Guided reporting**—not just for repairs, but for complaints, ASB, etc.



# VerseOne & Portals

Our digital transformation pedigree



# VerseOne: building portals for a decade

- **40+** market-leading, self-service portals
- API-driven bi-directional portals include:
  - **Westward Housing Group, Incommunities**—Capita Open Housing
  - **Sutton Housing Partnership, Peabody**—Northgate Housing
  - **Hundred Houses**—Civica Cx
  - **Aspire**—Manifest Universal Adaptor & Web Services, Orchard Housing, Kirona DRS / Cloud Dialogs
  - **Regenda Group**—Manifest Universal Adaptor & Web Services, Orchard Housing, Kirona DRS, ProMaster, Wisdom eDRM



# VerseOne Solution Stack

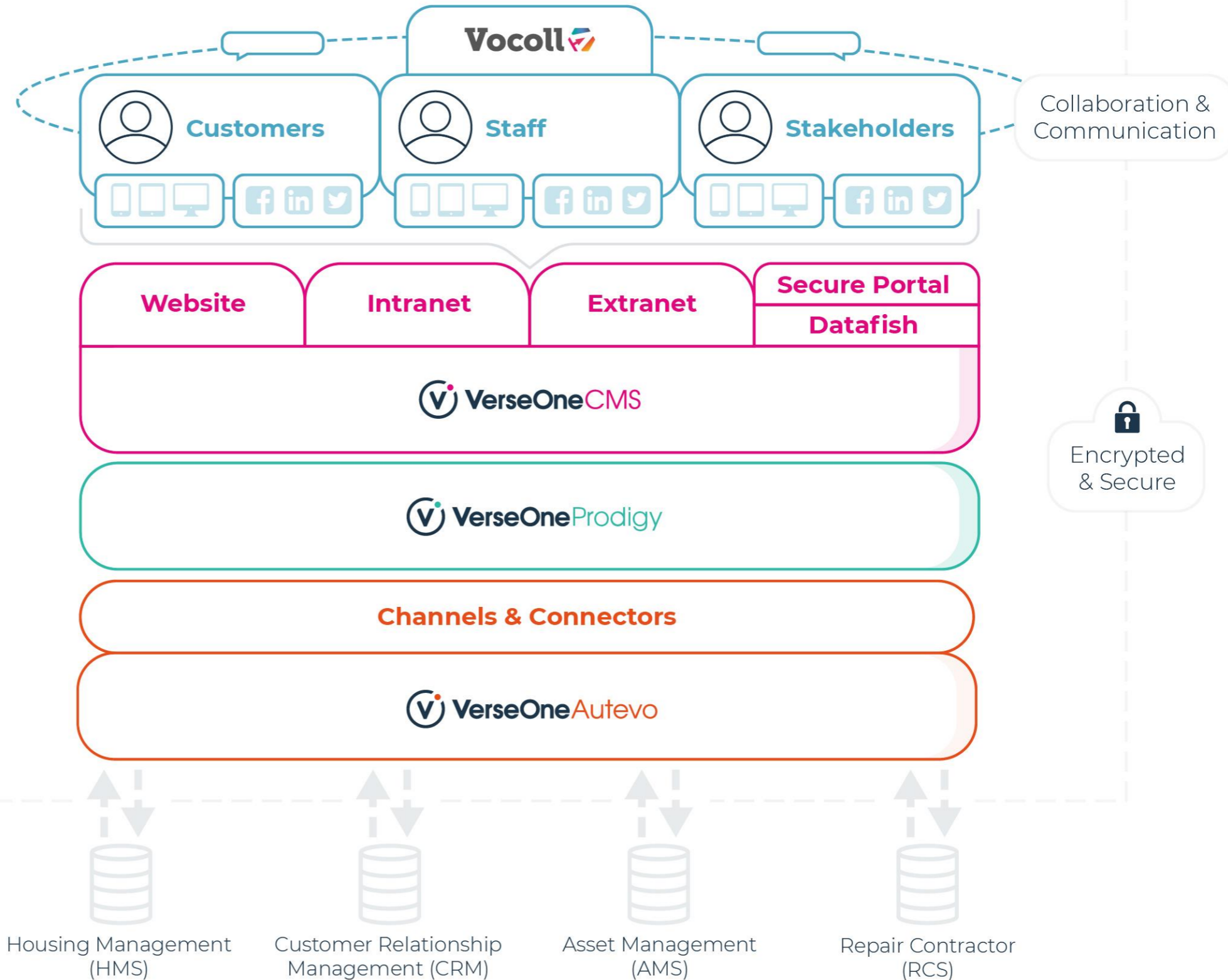
Omni-channel Access

Content Management

Ai Logic

Integration & Data Normalisation

Enterprise Systems





# Integrations

**CIVICA**  
Transforming the way you work

**CAPITA** | Software services

**DRS** Xmbrace DRS

**northgate**  
PUBLIC SERVICES

**rightmove**

**Vacancy Filler**  
Recruitment Software

**Orchard**

**handepay**  
merchant services

**worldpay**

**Manifest**  
software solutions

**allpay**



# Portal Rol: since end January 2018

**2,175+**

**Registered  
Tenants  
(~24%)**

Nominal saving @£560pa = £1.61m

**+** **Repairs  
reported**

**280+** **Self-appointed  
repairs**

Estimated time saved @15m per job = 430h  
~ 57+ working days

Nominal saving @£125ph = £72,626 pa





# VerseOne in Housing

The  
**Regenda**  
Group



**Bolton**  
at **Home**



wandle



# Summary

- **Set your KPIs**, and measure constantly against them
- **Engage your front-line teams**—they *will* have ideas for quick wins
- Ensure that you have the right **technical platform** to connect your customers with their information
- **Clean your data**—and have fall-backs
- Have a **communications plan**—for launch and on-going
- Solicit plaudits!



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