

Accommodating change at New Charter Housing



Hardware

2 DELL servers

3 Kodak 260 D scanners

Software

eFIRST archive

eFIRST capture

eFIRST case

New Charter Housing Trust Group is one of the UK's largest Registered Social Landlords. Formed in 1999 to own and manage properties that were previously controlled by Tameside Metropolitan Borough Council, New Charter now manages 15,600 properties. This vibrant not-for-profit organization boasts an annual turnover of £49 million (US\$77.9 million, €66.15 million), and has a workforce of 800.

New Charter processes 6,400 applications for housing annually, deals with enquiries from existing

tenants and the public, monitors new government initiatives and legislation, acquires new properties and maintains existing ones. For each New Charter property there is a paper-based folder containing site visit reports, property deeds, maintenance and repair job cards, etc. For each tenant there is a folder containing applications for housing, doctors' reports, tenancy agreements etc. In addition, New Charter must store a wide variety of government and legal documentation.

Maintaining tens of thousands of property and tenant files and folders, and the relationships between them, was a labor intensive and error-prone process. It consumed valuable time that could be better spent dealing with customers.

Committed to continuous improvement

The systems inherited from the Council were paper-intensive and cumbersome. New Charter is committed to a plan of continuous

improvement, and reviewed the organization's business processes to identify areas that could be streamlined. Electronic document management (EDM) was considered, and the potential benefits in terms of providing more effective process management and more responsive customer service were clear to see.

A moving situation

At the same time, New Charter decided to build new office premises in Ashton-under-Lyne to accommodate 370 staff from 16 locations in the East Manchester region. Although a 50,000 square foot facility would be sufficient to house the employees, an additional floor would be required to accommodate the paper mountain

they would bring with them. At an estimated additional cost of £600,000 (US\$950,000, €864,500) this was senseless, so the deadline for implementing EDM became inextricably linked to the building completion date of January 24 2004.

The EDM initiative represented an enormous change in business practice and a significant investment for New Charter. The Board needed assurances that the solution would address business critical issues and be gimmick-free. In February 2003 BancTec's property management solution was selected because New Charter felt confident that the system was technically and operationally capable of meeting its requirements. BancTec invited New Charter's management team to visit one of its



reference sites - British Telecommunications (BT) in Gateshead.

According to Alan Clarke, head of information services at New Charter, "What we saw at BT was very reassuring. Other vendors involved in the bid had been unable to convince us that their system would provide New Charter with enough benefits to justify changing the way everyone in our organization works. By visiting BancTec's reference site we were able to see a live system, working effectively to ease day-to-day operations, enabling BT to spend less time on administration and more time dealing with customers."

Property management made easy

Staff training will take place well before the system becomes fully operational in January 2004. Clarke: "Moving office will be a big enough task in itself. We need to be sure that we are up and running right away in the new building, and it is too much to expect our staff to adapt to new systems at the same time. BancTec has developed the property management system in a short timeframe, giving us maximum time to train all users prior to the move, so the move will be transparent to our customers."

500 New Charter staff members will gain electronic access to all property

and tenant files, enabling them to check the status of repairs, suitability of tenants, applications etc. with greater speed and efficiency. The system will dramatically improve customer service, save costly storage space and enable staff to spend more time assessing cases rather than searching for files. Incoming mail will be opened and scanned by operators. Staff will receive mail electronically, and workflow will be implemented to handle enquiries.

The enormous backfile of one million documents will be converted by BancTec's Managed Services operation in Harlow, and stored in eFIRST archive to provide a comprehensive online repository of all historical and current data relating to every property and tenant that has dealt with New Charter.

The benefits of the property management solution are considerable:

- * Physical space savings
- * Ease and speed of document retrieval
- * Enhanced customer service and enquiry handling
- * Improved tenant relationships
- * Elimination of physical duplicates
- * Tracking of tenant movements
- * Faster processing of housing applications
- * Effective management of building repair job tickets

Looking to the future

New Charter will build some new houses in the future, however the majority of properties will be replaced through acquisition. The BancTec solution will enable New Charter to add properties quickly and easily, as all historical records relating to the properties can be scanned and archived in a short period of time.

Finally, New Charter recognizes that it is nothing without its existing customers and tenants. Future plans for the system include enhancements to enable existing tenants to access the system, to facilitate communications and the overall level of service provided to them.

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technology

Feature-rich, cost effective input management from eFIRST capture

Have you ever considered how you can best manage your company's incoming correspondence? Or how to ensure your customers will receive the response they wanted in the expected time? Or how to best handle unexpected items that are exceptions to the norm, without upsetting organizational processes?

Businesses spend a huge amount of time and money processing incoming mail (both paper and electronic) and following up on it. All too often there is little control, and the amount of information available to help assess the level and type of activity undertaken is limited.

Nowadays customers not only communicate via paper but also via e-mail, web forms and faxes, so input management has become more complex than ever. Nevertheless, customers expect fast responses and know that technology is available to enable customer service representatives to answer enquiries quickly. In today's demanding, technologically advanced world, manual mail handling processes fail to address these customer needs adequately.

Many businesses are becoming increasingly concerned about their ability to manage correspondence effectively. They are seeking solutions that will control and manage the complete input channel infrastructure, improve service, save money and enable the business to be conducted more effectively. A tall order! But this is exactly what BancTec's eFIRST capture is delivering to world-class organizations around the globe.

eFIRST capture was launched in May 2003, and immediately generated considerable interest from customers, prospects, industry analysts and the press. eFIRST capture allows businesses to automate and control their input channels in a highly efficient manner, and is capable of handling the ever-increasing diversity of incoming information types. It is fully integrated with BancTec's case management and archive systems, which allow transparent data and document interchange to back-office processes and document archiving.

The first eFIRST capture customers are already reaping the benefits of implementation, and have found it to be both feature-rich and cost effective. Members of BancTec's sales team are happy to work with you to calculate the impact of introducing eFIRST capture into your organization, and to help determine what effect it will have when you start handling your information channels in an automated and uniform way. Depending on your specific needs, return on investment in under a year is not unusual!

As the next step in BancTec's continuing product enhancement program, a number of new features have recently been added including:

- * Improved e-mail and text file import.
- * Improved alerts functionality - incoming document streams can be monitored, and an email or mobile phone alert can be issued when a specific document is received, enabling rapid processing of urgent correspondence.
- * Integrated eFIRST auto archive - incoming data, including items that are still in progress, can be searched using specific index information or free text searches within the entire document content.

All of these features are included in eFIRST capture version 3.2, shipping from August 2003.

For more information contact: ukmarketing@banctec.co.uk