



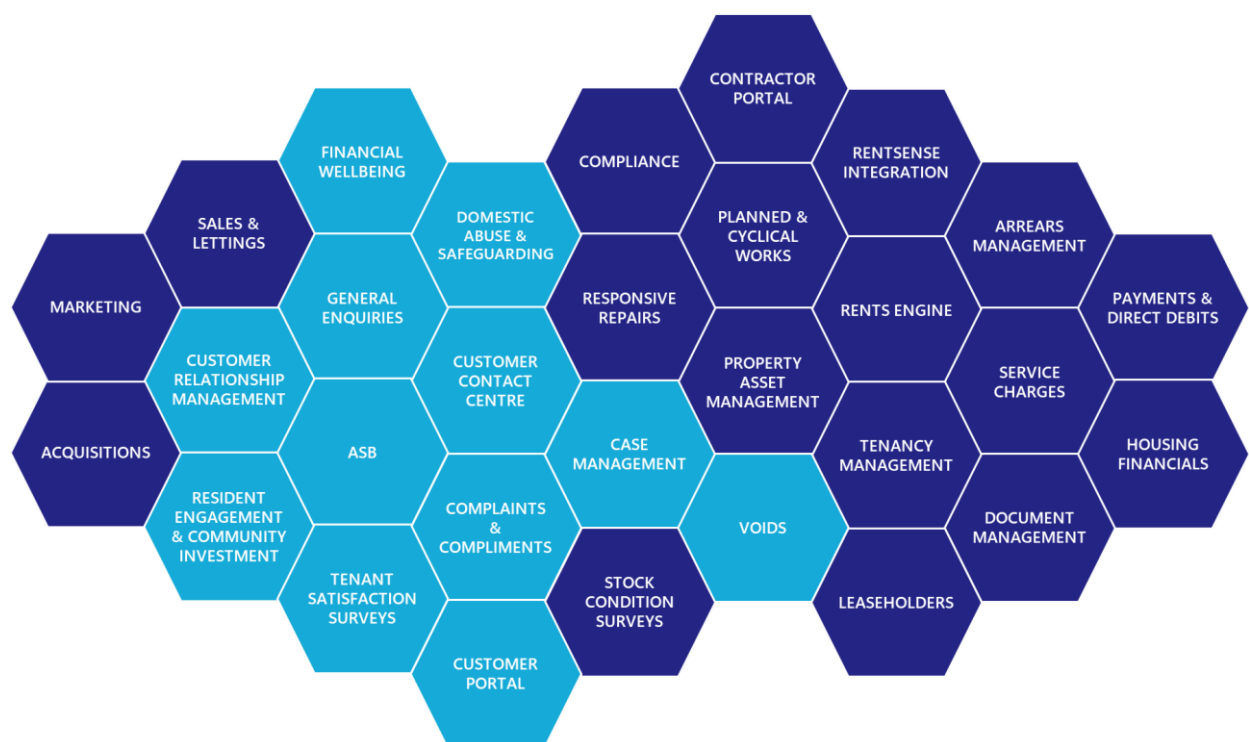
Esuasive Housing CRM and Customer Service

G-Cloud 15 Service Definition

About Esuasive Housing

Capture every customer interaction, schedule and track every repair, keep on top of asset maintenance, ensure compliance, and manage rents, service charges and arrears, all in a single, integrated, modular, cloud-based system which you control.

Esuasive Housing is a suite of pre-configured, ready-to-run social housing modules leveraging the flexibility of the Microsoft Cloud and built on Dynamics 365, Power Apps, Power BI, Power Portals and SharePoint, all linked to a single data repository – the Dataverse – that allows you to connect customers and teams, streamline business processes, deliver customer self-service and generate insights from data across the organisation.



Esuasive Housing: Conceptual Model

Customers can choose to implement Esuasive Housing within a single project, or incrementally as part of a legacy systems replacement / digital transformation programme.

This service definition document covers the implementation of Esuasive Housing CRM and Customer Service. Please see our other G-Cloud 15 listings for detailed information relating to individual Esuasive Housing solution components, including:

- Esuasive Housing Omnia
- Esuasive Housing Property Asset Management
- Esuasive Housing Responsive Repairs
- Esuasive Housing Rents, Service Charges and Payments
- Esuasive Housing Arrears Management

Esuasive

- Esuasive Housing Sales and Lettings
- Esuasive Housing Complaints and Compliments
- Esuasive Housing ASB
- Esuasive Housing Domestic Abuse and Safeguarding
- Esuasive Housing Tenancy Management
- Esuasive Housing Financials

Local Authority customers may also wish to explore:

- Esuasive Dynamics 365 and Power Apps for Local Authorities
- Esuasive Homelessness Application Management and Reporting

Esuasive also supports local authorities and housing associations looking for external professional support and maintenance for existing, in house, legacy Microsoft Dynamics applications, and for those wishing to migrate on premises Dynamics 365 applications to the Microsoft Cloud. These services are provided by Esuasive under G-Cloud 15 Lot 3, Cloud Support. Please see the relevant listing for further details.

Key features

Esuasive Housing CRM and Customer Service is a core solution within the Esuasive Housing suite.

Esuasive Housing CRM and Customer Service provides a complete CRM, contact management and customer service solution designed to exploit all of the capabilities of the Microsoft Dynamics / Power Apps platform, including -

- Contact Centre
 - With omnichannel capability built in to handle customer interaction by phone, text, email and social media.
- Pre-configured customer service processes for
 - Complaints and Compliments
 - Domestic Abuse
 - Safeguarding
 - Anti-social Behaviour
 - Financial Wellbeing
 - Resident Engagement
 - Community Investment
 - Customer surveys – triggered (e.g. Repairs follow up) and batch (e.g. Tenant Satisfaction)
- General Enquiries, covering
 - General information requests
 - Freedom of Information requests
 - GDPR Subject Access Requests
 - all kinds of other general enquiries.
- Fully integrated configurable Customer Portal:
 - Enabling customer self-service to raise enquiries, make a complaint, report anti-social behaviour, view their tenancy account, etc.

Benefits

Complete CRM / Customer Service solution: Contact management, case management, workflow, visual alerts, and customer portal are all included as standard.

Integrates perfectly with other Esuasive Housing solutions and components: Making it easy to align incremental delivery of Esuasive solutions with a broader digital transformation programme.

Proven and fully tested: Designed and developed from the ground up in collaboration with our housing association customers. Fully tested and battle hardened.

Pre-configured and ready to run: Requiring only normal configuration, data migration and user testing prior to go live.

Easily customisable: Delivered as an open solution, meaning both Esuasive and our customers can make changes and enhancements as business needs evolve.

Shorter implementation timeline: Implementation can be completed in months rather than years, at a pace which aligns with your broader transformation change objectives.

Increased efficiency: From having all customer / contact data stored in one place, easily accessible from desk or mobile device by any employee or contractor with permission to do so. And through the implementation of streamlined business process flows which drive team workloads, automate repetitive tasks, ensure consistency and eliminate errors.

Insights: With real-time views of the data available at the click of a mouse, plus all of the capabilities of Excel, Power BI and Microsoft AI tools to manage against KPIs and deliver strategic insights.

Built on the world-class Microsoft Dynamics 365 and Power Apps platform: Runs in the Microsoft Cloud for scalability, performance, and security. Works with Microsoft Office, Teams and other Microsoft products. AI-ready, to exploit powerful AI capabilities coming on stream from Microsoft. Direct integration with SharePoint for secure document management.

Mobile enabled out of the box: On iOS and Android powered mobile phones, tablets and notebooks.

Product roadmap: Esuasive publishes a three-horizon roadmap designed to deliver both regular incremental enhancements and technology-driven innovation.

Implementation

Implementation of Esuasive software is carried out by Esuasive's Professional Services team, working closely and collaboratively with your in-house team to achieve a successful outcome.

Please note, Esuasive offers two styles of implementation:

Adopt: Implementation of standard Esuasive solution functionality.

Adapt: Implementation of the Esuasive solution with customisations to meet specific requirements.

Adopt Implementations

In an Adopt implementation:

Esuasive typically takes responsibility for the following:

- Project management, in conjunction with the customer project manager
- Configuration of system workflows to route activities and/or cases to specified queues / individuals
- Configuration of customer-specific target times / SLAs embedded within the Esuasive solution
- Providing advice on Microsoft and other third-party licensing
- Set up of environments (Dev, Test, Prod)
- Provision of pre-formatted data mapping / data load templates, to be populated by the customer with data to be migrated to the Esuasive solution
- Training for customer technical staff / superusers in how to load data into the Esuasive solution
- Deployment of the Esuasive solution through the environments
- Train-the-trainer training on all standard functionality
- Training for customer sysadmins covering managing role/user security
- Training for 'superusers' in how to create / amend email and document templates
- Provision of standard reports, views, charts and dashboards
- Training on how to create, amend or extend reports, views, charts and dashboards
- Support of customer-led module testing, system testing and user testing
- Cutover to Production ('Live')
- Hypercare

The customer team is typically responsible for:

- Customer-side project management
- Data migration, data cleansing, data archiving
- Migration/creation of email and document templates
- User testing
- Customer-side cutover activities
- Decommissioning of redundant systems

Please note that where the implementation project also includes Esuasive Housing Financials, additional Finance-specific work is specified. Please see our detailed G-Cloud 15 listing under Esuasive Housing Financials.

Adapt Implementations

For customers who have specific requirements not supported 'out of the box' by Esuasive, an Adapt implementation may be suitable.

Adapt implementations typically incorporate all of the implementation project stages and tasks listed under Adopt, above, but will tend to also include some or all of the following:

- Discovery, scoping, roadmapping, phasing
- Detailed requirements definition
- User Design workshops
- Customisation of the Esuasive solution to meet customer-specific and agreed additional requirements and designs, and to deliver these as changes and/or enhancements to the Esuasive core solution.
- Development of non-standard interfaces and/or integrations to other systems or online services
- Development of additional reports, views, charts and dashboards
- Provisioning of additional environments
- Additional training to cover customer-specific changes / enhancements

Post-implementation support and software maintenance

Post-implementation support includes:

- Hypercare: priority-response support in the immediate post go-live period
- Long term support: responsive support in line with Esuasive's standard SLA
- Software maintenance: the provision of Esuasive software updates