



## ABOUT THE CLIENT

Shelter is a charity that helps over a million people a year struggling with bad housing or homelessness. It gives advice, legal support, information and advocacy to people in housing need and tackles the root causes of bad housing by lobbying government and local authorities for new laws, policies, and investment.

As a leading expert on housing in Britain, Shelter works with the housing sector to promote good practice, publish reports, and deliver professional training.

## A CRM solution to increase efficiency and enhance customer service

Gap Consulting deliver a solution to improve call centre efficiency for one of the UK's leading housing and homelessness charities.

## KEY BENEFITS



- Increased productivity and efficiency
- Simplified call handling reducing average call time by 3 minutes
- Enhanced customer service
- Instant intelligence through real-time alert and conflict search capability
- Improved process to support legal compliance
- A roadmap for future enhancements

## REPLACING AN UNDERPERFORMING SYSTEM

Shelter uses a case management system to manage information across all of its services including its contact centre and face-to-face site services. Used by 60 employees, the existing system had a number of problems and was failing to perform to the standard required so the decision was taken to replace it.

In assessing its options, Shelter worked with experts from external consultancies to draw up a list of case management systems used by top legal firms, as well as solutions offered by large CRM vendors such as Microsoft and Salesforce.

A Request for Information (RFI) was issued to help Shelter narrow down its options to a shortlist of 10 products and vendors, who were then given a detailed Request for Proposal (RFP) outlining Shelter's operations and its requirements. The shortlist was made up of a mixture of case management and CRM systems, including Microsoft Dynamics CRM. Microsoft's RFP response included Gap Consulting as a recommended implementation partner.

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*"Following a rigorous selection process, four vendors were invited to meet with Shelter to discuss and demonstrate their system," says Stuart McSkimming, Head of IT at Shelter. "As a result, we concluded that the best solution for our needs was a combination of a case management system integrated with Dynamics CRM implemented by Gap Consulting."*



*"We particularly like the security and assurance of using a Microsoft product. Not only have we bought the product today, but we are part of the continual improvement and development of Dynamics CRM."*

## INNOVATIVE SOLUTION TO REDUCE CALL TIME

Gap worked with Shelter to discuss the integration of the products and draw up a statement of work based on the detailed specification that had been included in the RFP. The interface between the case management system and Dynamics CRM was to be kept as light as possible, with Dynamics CRM configured to accommodate Shelter's requirements.

The project was divided into phases with the first covering Shelter's contact centre – a national helpline handling 140,000 calls each year and offering general advice to people who have issues with their housing or are in danger of becoming homeless.

*"Demand on the call centre was exceeding capacity so a key objective of the project was to reduce data entry time per call by three minutes, therefore increasing efficiency and allowing the helpline to assist a greater number of people,"* explains McSkimming.

Gap customised Dynamics CRM so it could capture information including the caller's contact details, the nature of the problem and any significant issues. It was important that the data entry into the system was as streamlined as possible while retaining the necessary structure to allow meaningful reporting.

The case form to be completed in Dynamics CRM for each call was radically enhanced to enable single-click creation of contacts, and JScript was used to pre-populate as many fields as possible – all configurable on a user by user basis.

A crucial part of the solution provided by Gap was the 'Alert Monitor'; when cases are entered in the system it is essential that any safeguarding and welfare concerns recorded against potentially vulnerable clients are instantly flagged. Microsoft Silverlight was leveraged to provide real-time interactive visibility of any alert records directly or indirectly linked to a particular client via other cases or connections.

Conflict searches were another important area to embed into the new solution.

*"Shelter must ensure it complies with legal requirements stating that help should not be provided to clients where a conflict of interest exists,"* explains McSkimming. A Silverlight application was built to provide enhanced search capabilities to identify related contacts and cases that could represent a conflict. *"Helpline workers are now able to terminate such calls at an early stage of the process, avoiding time wastage and legal compliance issues."*

A large quantity of data involving several million records needed to be accurately transferred to the new system as part of the delivery. Specialist Dynamics CRM integration software from Scribe Software was employed to migrate information from Shelter's incumbent systems using

complex mapping and data transformation. Scribe Online was used to create an offline data repository for reporting to ensure the live system was protected from resource heavy queries, and real-time integration now enables two-way communication with Shelter's legal back office systems.

## INCREASING PRODUCTIVITY AND EFFICIENCY

*"The new solution has increased the productivity of Shelter's helpline and met its target of reducing average call time by three minutes,"* highlights McSkimming. *"This increase in efficiency means that the call centre is able to handle more calls and has increased customer service levels."*

Phase two of the project will address how Shelter delivers advice to clients over a longer period of time to assist with a number of issues, where cases might be handled and tracked across several sources of help. The solution is being built using the case management functionality of Dynamics CRM, allowing Shelter to track activities on each case with a full audit trail across all the stakeholders involved, again increasing overall efficiency and productivity.

## AN ONGOING JOURNEY

*"Shelter has been impressed with Gap Consulting and found them to be extremely professional,"* continues McSkimming. *"When we went through the RFP process, Gap gave us detailed time and cost estimates and now we are in the project they have kept to those estimates. Being a charity, every penny counts so this was very important to us."*

*"Shelter has particularly enjoyed the security and assurance of using a Microsoft product. Not only have we bought the solution today, but we are part of the continual improvement and development of Dynamics CRM going forward,"* highlights McSkimming. *"We now have access to the whole range of Microsoft tools and look forward to exploring this roadmap over the next few months."*



### For further information contact

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