

Project Report: Streamlining Repair Logging for a Housing Association Using Salesforce CRM

Background: A Housing Association in the northwest of the UK faced challenges with its lengthy and cumbersome process for logging repairs. Typically, repairs or queries were initiated via a form on the website, prompting representatives to call and follow up with tenants. Alternatively, tenants directly contacted customer care to address their concerns. The Association sought to create a seamless, intuitive process leveraging Salesforce CRM to improve the repair logging experience and integrate it with their existing system. For instance, they needed an optimized solution to log repairs for issues such as bathroom leaks efficiently.

Task Overview: The Housing Association tasked us with designing and implementing a streamlined and user-friendly process for repair logging. The objective was to reduce inefficiencies, enhance communication, and ensure effective resource allocation. The new process needed to accommodate the nuances of repair liability and prioritize quick resolution while remaining compatible with the Association's current systems.

Approach:

1. Research and Analysis:

- Conducted a detailed assessment of the existing repair logging process to understand the steps involved and the average time taken.
- Identified key challenges, such as determining repair liability, which was governed by a 16-page document outlining the responsibilities for different types of repairs.

2. Process Mapping:

- Developed a comprehensive process map to visualize the optimized repair workflow.
- Outlined key steps, including logging repair requests, assessing priority, assigning technicians, and monitoring repair progress.

3. Solution Design and Implementation in Salesforce CRM:

- **Custom Object Creation:** Developed custom objects for repairs and technicians to store all relevant information necessary to log repairs and outline the subsequent steps to be carried out by the appropriate team of technicians.
 - **Screen Flow and Log Repair Call Script:** Created a step-by-step guided script for Customer Service Representatives (CSRs) to log repair requests efficiently while inputting all necessary information.
 - **Automated Lookup Fields:** Designed lookup fields to retrieve tenant details and address information automatically based on initial inputs.
 - **Categorization of Repairs:** Consolidated repairs into common categories using the 16-page liability document, distinguishing Association responsibilities from tenant responsibilities.
 - **Priority Assessment Framework:** Implemented a framework using Impact and Urgency levels to guide CSRs in prioritizing repairs. Tooltips were added for quick reference during the process.
 - **Integration with Salesforce Lightning Apps:** Incorporated all components into a customized Service App for a seamless experience.
 - **Repair Status Visibility:** Designed a Path component to provide real-time visibility into repair stages, such as "Assigned to Technician," "Awaiting Parts," and "Completed."
 - **Enhanced Communication:** Developed email templates with the company's branding to notify tenants about repair status, assigned technicians, and progress updates at each stage.
 - **Feedback Collection:** Automated tenant feedback collection through a post-completion survey sent via email, enabling the calculation of Customer Satisfaction Score (CSAT).
 - **Reporting and Analytics:** Created dashboards and reports to monitor technician performance, analyze repair trends, and support strategic planning for resource allocation.
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Outcome and Impact: The implemented solution significantly improved the efficiency and effectiveness of the repair logging process:

1. Time Savings:

- Achieved a 75% reduction in the time required to log repairs and assign technicians. Pre-defined conditions and automated processes minimized manual effort.

2. Enhanced Productivity:

- Freed up the Service Team's time to focus on conducting repairs and planning resources rather than administrative tasks.

3. Improved Communication:

- Streamlined communication with tenants through automated, professional updates at every stage of the repair process.

4. Actionable Insights:

- Provided valuable insights through dashboards on technician performance, repair types, and tenant feedback, enabling data-driven decision-making.

5. Scalability:

- Designed a solution compatible with existing systems, ensuring easy employee training and scalability for handling over 80,000 repairs annually (as highlighted in the Association's annual reports).

Conclusion: The Salesforce CRM-based repair logging solution successfully addressed the Housing Association's challenges, transforming a lengthy and complex process into an efficient and intuitive system. By automating key components, enhancing communication, and providing actionable insights, the solution delivered measurable improvements in service delivery and tenant satisfaction. This project exemplifies the impact of leveraging technology to streamline processes and enhance operational efficiency.

Snapshots of the App

Repair R-00000046
[New Contact](#) [New Organization](#) [New Household](#)

>

Completed

Closed

Repair Status: Completed
[✓ Mark Repair Status as Complete](#)

Related	Details
Repair Name R-00000046	Repair Technician Lena Spanner
Account Bates and Sokolov Household	Repair Responsibility Believe Housing
Repair Type ⓘ Plumbing	Issue Description bathroom tap leak
Repair Status Completed	Part Description
Priority Low	Quantity
Owner Adarsh Nair	Estimated Cost
Tenant Address 	Tenant Feedback

Activity

Filters: All time • All activities • All types

[Refresh](#) • [Expand All](#) • [View All](#)

▼ Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

▼ December • 2024 Last Year

- >

Your Repair Has Been Successful--

12:04 | 16 Dec 2024

nairadarsh294@gmail.com sent an email to [Eleonora Bates](#)
- >

A Repair Technician Has Been A--

12:02 | 16 Dec 2024

☒ Unopened
 nairadarsh294@gmail.com sent an email to [Eleonora Bates](#)

No more past activities to load.

Custom Repair Object Created for handling repairs and contains the required information.

View All

Nothing due today, be a go-getter, and check back soon.

View All

Today's Events

Looks like you're free and clear the rest of the day.

View Calendar

* Repair Status ⓘ

--None--

Reported
Assigned to Technician
In Progress
On Hold
Awaiting Parts
Part Received-Awaiting Installation
Completed
Closed

" Thank you so much for providing all those details. I've logged the repair request, and a technician will be assigned to handle it. We'll keep you updated on the next steps, and "

* Repair Type ⓘ

--None--

" When did you first notice this issue, and has it worsened over time? (This helps determine if it's becoming an urgent issue.) How frequently do daily activities suffer—ask how it typically affects your life?"

Based on the customer's input, you have to select the priority level. Assess the issues using impact and urgency framework.
For eg: anything related to security should be set to high/urgent priority

* Repair Priority ⓘ

--None--

* Repair Status ⓘ

--None--

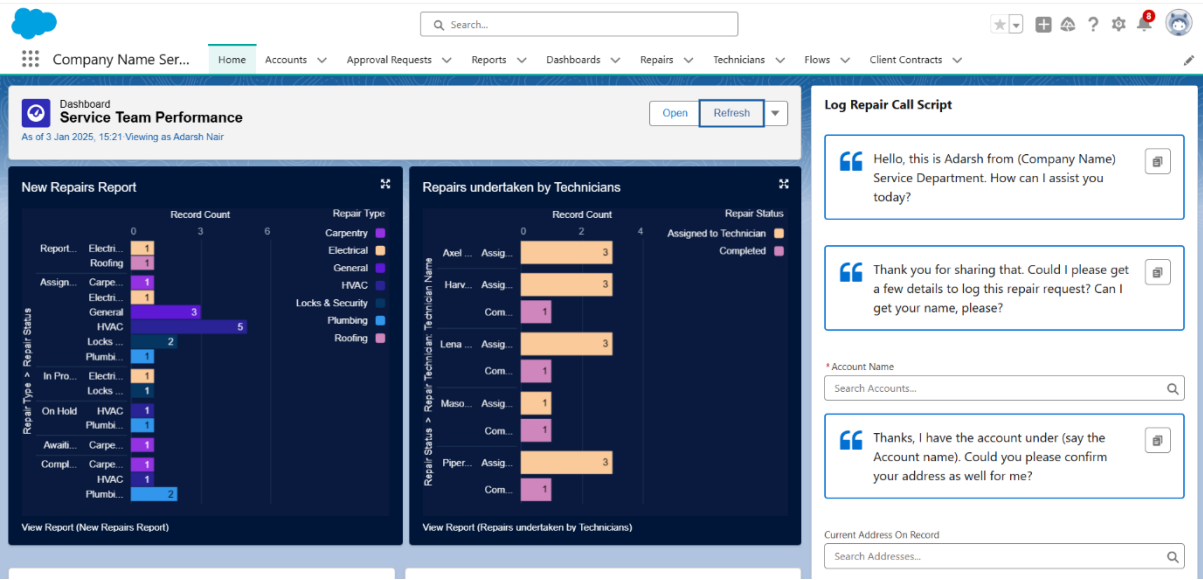
" Is there anything else you think might be important for us to know? Have you attempted any temporary fixes or taken any actions to resolve the issue so far?

Internal Comments/Notes ⓘ

Repair Status designed for each stage and facilitate better communication with the tenants



Repair Types categorisation into buckets that will help in resource allocation



Custom App Home Page configured with a relevant dashboard and integrated Call Script for streamlined access by Customer Service Representatives