

London & Quadrant

Customer Success Case Study



L&Q Perfects Customer Interactions with Microsoft Dynamics 365 from CRM

London & Quadrant is a regulated charitable housing association and one of UK's most successful independent social businesses. The L&Q Group houses around 250,000 people in more than 92,000 homes, primarily across London and the South East.

Challenge

As the largest landlord in London and the South East, L&Q provides affordable homes to more than 92,000 families and invests in social housing projects to help develop communities "where people want to live." L&Q was using Microsoft Dynamics CRM as a central platform to manage and drive all interactions with customers (tenants), contractors, government agencies, and social services organizations.

The real estate company originally started using Microsoft Dynamics CRM to track complaints and manage correspondence with members of parliament and councillors from local municipalities. Over time, it became the core platform for developing solutions, handling customer inquiries, and executing housing management functions.

L&Q had also implemented Unified Service Desk to help agents navigate through the systems they were using daily, and enable the organization to incorporate their policies into scripts they followed when speaking to customers. A combined Microsoft Dynamics CRM and Unified Service Desk solution was developed to manage anti-social behaviors.

Product

- Experlogix Document Automation

Benefits

- Increased efficiency
- Accelerated document processes
- Improved customer experience

Tech

- Microsoft Dynamics 365 CRM

These technologies were working well, but L&Q wanted to perfect the way they were interacting with their customers through documents. Experlogix, a document generation solution for Microsoft Dynamics 365, was the final piece of the puzzle.

Solution

Automated Document Generation Across all CRM Processes

L&Q uses Experlogix in all of their core Microsoft Dynamics CRM processes, where outbound communications are based on white-print documents either attached to emails, or printed and sent. The solution enables the real estate company to immediately respond to incoming complaints with a personalized acknowledgement letter sent automatically. Inquiries – from local members of parliament corresponding on behalf of their constituents, for instance – also trigger automated answers providing clear and accurate information.

Plus, with Experlogix for Dynamics 365, the L&Q team can efficiently generate and send the critical documents required by housing management, from customers' tenancy agreements to incidentbased correspondence regarding rent collection and antisocial behavior. These documents include both standard and customer-specific content that is pulled from the right Microsoft Dynamics CRM record through configurable business rules. Before L&Q started using the Experlogix solution, creating and generating documents were manual tasks.

360-Degree View of the Customers

One of the organization's main objectives was to provide employees with a 360-degree view of the customers. Experlogix's integration with Microsoft SharePoint was a perfect fit as it saves and stores generated documents into their correct SharePoint library. When an agent interacts with a customer, they have access to all relevant documents and information directly from the SharePoint document grid of the customer record, in Dynamics CRM.

L&Q's data exchange program with Experian, a credit information provider, also contributes to offering a comprehensive view of the customers. The program allows L&Q customers to improve their Experian FICO® Credit Score by making timely rent payments. Experian informs L&Q of any significant fluctuations in their customers' credit scores. The real estate company can then use this information through Experlogix to trigger payment notifications to tenants. This process enables L&Q to intervene quickly, protect customers who may be likely to have rent arrears, and avoid evictions.



Result

The adoption of Experlogix for Microsoft Dynamics 365 enabled L&Q to replace manual document creation and generation processes with automated versions. Creating and delivering mission-critical documents such as acknowledgement letters, tenancy agreements, and incident reports that include accurate, relevant customer data, is done automatically from Dynamics CRM. Besides the efficiency gains, the Experlogix solution brought improved consistency to L&Q's outbound communications.

The integration with Microsoft SharePoint provided a centralized document management and storage platform, where the L&Q team could quickly access a specific customer's documents and information. With the Experian data exchange program, Experlogix for Dynamics 365 empowered L&Q to leverage important data triggering payment notifications through accelerated document processes. These capabilities helped the real estate company provide a more personalized service, resulting in faster resolution and improved customer experience.

Throughout the implementation of the solution, L&Q worked closely with the Experlogix team: "It has been a fabulous experience all the way," said Mark Hammond.



"With Experlogix for Microsoft Dynamics 365, our documents are created, managed and stored centrally, which gives us far more control over the consistency of all our documents. This is key to providing the best service to our customers."

Mark Hammond

Business Transformation Programme Manager

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