



**A NEW,
TENANT-FOCUSED**

CRM SOLUTION

CASE STUDIES 2025/26





OVERVIEW

As part of our ongoing focus on improving services for our Tenants, Midland Heart launched a new customer relationship management (CRM) solution on 1st September 2025. The CRM solution enables all Colleagues to log interactions with Tenants in a single place in NEC, therefore improving records keeping and creating a single view of our Tenants. The single view of our Tenants is helping us to improve our services through putting vital information in the hands of our frontline Colleagues. Additionally, improved reporting is helping us to understand why, how and when Tenants are contacting Midland Heart, which will lead to insights that can shape how we improve our services.

The first phase of the implementation went live on 1st September that focused on moving users of S360 onto the NEC CRM. We are now in the process of rolling out the new system to all remaining Colleagues who interact with Tenants.



PROJECT OBJECTIVES

The Steering Group agreed the following project objectives:

Area	Objective	Delivered By
Tenant Focused	To introduce process changes that will enable our colleagues to deliver an efficient and quality service for customers who contact Midland Heart	- Removing dual system data entry by recording all customer interactions, communication history, interaction notes, and related service requests within a single system. - Providing Midland Heart employees easy access to the master data held against the customer and their property within the NEC system. - Delivering a consolidated view of the interaction history and the associated notes against the customer and their property within the NEC solution.
Management Information	To enable Midland Heart to make informed decisions that will improve the services for our tenants	Introducing new reports that will improve our understanding of who/why people are contacting Midland Heart and what we are doing to resolve their enquiries.
Project and System	To ensure the solution is simple, intuitive and supportable	- Having a simple, user-friendly solution where recording customer interactions is done with minimal clicks. - Utilising out-of-the-box NEC CRM functionality with no bespoke developments.
	To migrate people, process and data from S360 to the NEC system, while ensuring there is continuity of service	- Identifying, designing and transitioning all required S360 processes (used by the Hub and other departments) to the NEC system. - Ensuring appropriate training and communications are delivered to support all impacted S360 users. - Migrating relevant S360 interaction history and notes to the NEC CRM solution so that, post-go-live, our customer services agents can continue to triage customer interactions effectively. - Ensuring the new solution and supporting processes maintain the current levels of service provided by the Hub (e.g., no overall increase in AHT).



HOW WE DELIVERED THE CHANGE

It was recognised that in addition to designing, building and testing an intuitive system, to make the change stick more was needed to be done. Therefore, the project included:

- Extensive training to over 500 end users via a network of c60 Super Users
- Inclusion of the Midland Heart Mindset in all training sessions
- Records keeping training embedding in system training
- Super User training and ongoing support
- Tenant Scrutiny engagement, including mock calls to demonstrate and gain feedback on the usefulness of the system
- Management engagement to embed the change
- Agreement of a quality assurance and control framework with supporting reports via PowerBI
- Over 50 knowledge pages have been developed for all teams to support Tenant request resolution at the first point of contact

The project team adopted an iterative approach to designing and building the CRM system, with regular feedback from end users incorporated into the approach. The core project team consisted of:

Person	Role	Project Responsibilities
Naz Sanghar	Head of Customer Service	• Ensure end user needs are met through the development of the system • Ensure training meets the needs of end users, developing training materials with Talent • Deliver Super User training with the support from the project team and BI
Paul Evans	Senior Business Analyst	• Develop system specifications based on user needs, project outcomes and customer service best practices • Develop processes and requirements • Provide ongoing feedback on system development, ensuring end user views are represented • Co-author training content • Support testing and provide go live support
Gurj Be	Business Systems Analyst	• Develop the system based on requirements • Resolve defects found in testing and provide go live support
Ria Sahota	Trainee Project Analyst	• Coordinate business change activities including communications and training • Maintain the list of Super Users and End Users • Manage training completion through tracking progress

The team worked together closely during the implementation to make rapid design and build decisions so that the implementation proceeded at pace. The iterative approach to the project removed waste from the process because the solution could be viewed and changed along the way, rather than waiting for feedback during testing. Feedback from the project team highlights the positive impact of co-locating project teams and the value of business and analyst roles working closely together to understand business needs and to design solutions that make the greatest impact.

RESULTS

As of 28th October 2025, over 36,000 customer contacts have been logged in the new solution by teams from across the business. CRM will help Midland Heart to understand the reasons why Tenants contact us and how we resolve their issues. Therefore, the new solution is rapidly becoming a source of rich customer data that can be used to shape future service delivery.

Positive feedback has been received from system users. Some examples are as follows:



Customer Experience

“It’s easier now and everyone can see each other’s notes.”



Hub

“Makes my life easier now that I can see every interaction.”



Tenancy Services

“When doing legal instructions, its really useful to put the information together.”



Income

“We have somewhere to log customer interactions that are not related to Rent.”



Mutuals

“Whilst I am sure we are all still familiarising ourselves with CRM, I have found it to be a useful tool allowing us to put the Tenant at the heart of any conversation. It gives an accurate snapshot of our interactions with the Tenant, allowing us to have a more meaningful conversation to resolve whatever query or concern may have arisen. It is no secret that I was a fan of the previous Service 360 but change always brings opportunity and I love what has been rolled out here!”

“I have been using the CRM system and found it particularly useful for one of my cases at PCWR stage. Overall, I have found it to be useful to see information all in one place.”

– Kathryn Chin, Rent Payment Officer

“My team have been utilising the CRM. It really helps when using it as a viewing platform to capture repairs and any other calls coming in from our tenants, and helps with identifying who to email.”

– Ferdy Hussain, Area Manager

“The CRM gives us a quick overview of each tenant contact, so it is really useful for complaint handling and court/eviction checks.”

– Kate McKivett, Area Manager





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