Process Redesign and Technical Integration for Social Housing Provider

SARATOGA

The client

For over 95 years, our client - a leading social and affordable housing provider - has provided affordable, accessible housing solutions to low-income homes. Managing over 1,300 properties across residential and commercial sectors, they focus on creating sustainable living environments for their tenants.

The challenge

Our client engaged us to address inefficiencies in their utility business processes. The organisation relied on manual recoveries, siloed operations, inconsistent data, and a lack of integration between systems and processes. This led to operational inefficiencies, revenue leakage, and tenant dissatisfaction.

Key challenges included:

- **Manual and Inefficient Utility Processes:** Spreadsheets and disconnected systems caused delays and errors in utility recoveries.
- **Data Discrepancies**: Inconsistent tenant data across systems led to inaccurate billing.
- **Siloed Operations:** Limited collaboration among Finance, Rental Property Management (RPM), and Facilities teams reduced accountability.
- **Vendor Management Issues**: Inconsistent Service Level Agreement (SLA) enforcement with utility vendors impacted recoveries.
- **Tenant Communication Gap**s: Ineffective communication channels led to disputes and delays.

Our client's goals were to streamline and automate utility processes, ensure accurate billing and recoveries, enhance cross-departmental collaboration, and improve tenant engagement and communication.

The solution

Saratoga collaborated closely with our client's RPM, Finance, and Facilities teams through regular workshops and feedback sessions to ensure alignment. Regular check-ins ensured stakeholder buy-in and project alignment.

The implementation included:

Step	Objective	Approach	Outcome
1			
Gap Analysis	Identify discrepancies in utility payments, billing accuracy, and collection processes.	Analysed payments, billing records, and collection data to uncover issues.	Highlighted problems such as under-recoveries, unknown meter statuses, and tenant behaviour affecting recoveries.
2			
Property Assessment	Focus on properties causing revenue leakage.	Reviewed utility usage and tenant billing data to pinpoint issues.	Prioritised properties requiring immediate action to address inefficiencies.
3			
Root Cause Analysis	Determine the root causes of revenue leakage.	Examined meter-to-tenant linking, municipal invoice discrepancies, and consumption anomalies.	Documented property-specific challenges, such as unaccounted utility charges.
System Integration	Address system integration gaps with phased technology upgrades.	Conducted a technology audit to identify integration opportunities. Designed a phased roadmap to implement data synchronisation and real-time monitoring tools.	Recommended upgrades to improve data flow, reduce manual interventions, and ensure seamless cross-departmental collaboration.

The results

The engagement met our client's expectations and aligned with their strategic goals. Additional to the original scope of work, the results informed the business on which properties are feasible for sale or require immediate attention to reduce revenue leakage. By quantifying the issues, the client was able to prioritise and focus on tackling the issues that had the greatest strategic impact.

Tangible results are:

- **Billing Accuracy**: Reduced errors in tenant billing.
- **Efficiency Gains**: Streamlined processes saved significant administrative time.
- **Tenant Satisfaction**: Improved communication channels reduced disputes.
- **Accountability**: Clear roles and responsibilities fostered cross-functional collaboration and supported the results above.

Client Feedback

The client expressed satisfaction with the improved processes and the structured approach taken by Saratoga. The focus on utility meter audit data accuracy and cross-functional alignment was particularly appreciated.

Saratoga helped our client turn a tangled mess of manual utility processes into a streamlined system that just works. We tackled billing inaccuracies, tenant data discrepancies, and siloed operations and delivered a solution that saves time, reduces disputes, and improves tenant satisfaction.