



Digital Transformation

Document Pack Guidance

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Distribution

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1. Introduction

In February 2022, Community Housing Industry Association (CHIA) NSW and CHIA Victoria teamed up to launch a Digital Transformation project.

Housing Information Solutions (HousingIS) was engaged to compile a guidance pack and toolkit to enable community housing organisations (CHOs) to assess, plan and implement digital transformation initiatives across their respective spheres of operations.

CHIA NSW is thrilled to be working with CHIA Vic and grateful for the funding support from the NSW and Victorian Governments as well as the National Housing Finance and Investment Corporation (NHFIC) on what will be an innovative and valuable step forward for the sector.

With the community housing sector still a relatively small market segment in the eyes of major technology players and providers, there is work to be done to develop digital technologies to increase the efficiency of CHOs' operations and enhance the service they provide to vulnerable people, many of whom are marginalised in the digital divide.

New digital technologies (like mobile platforms, tenant portals, e-payment options and many more) can be a catalyst for change and will improve service delivery by supporting CHPs to interact with tenants through additional, more efficient channels.

Giving tenants the ability to conduct more self-service (like lodging repairs and maintenance) will allow CHOs to work with a more mobile workforce, increasing efficiency and freeing up time and resources to focus on engaging with their tenants in meaningful ways.

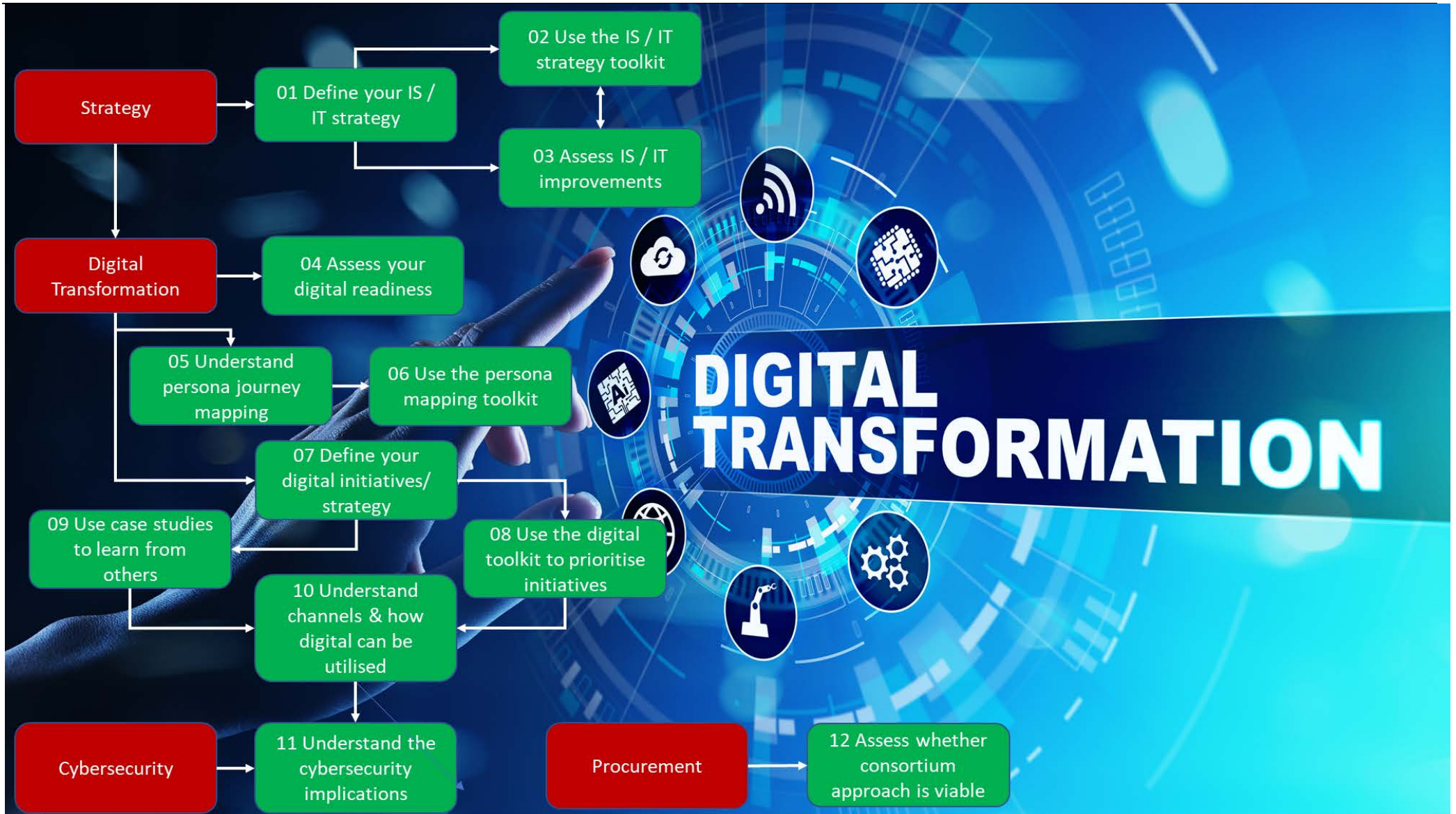
The project comes after scoping workshops with CHOs which showed a shared interest in working collectively to better understand and develop technological capabilities across the sector.

It aims to support organisations to understand their future IT needs and available solutions and to develop plans to upgrade IT infrastructure in order to improve the client experience, ensure data quality, improve cyber security and increase efficiency by eliminating manual processes and double handling.

2. Purpose

This purpose of this document is to provide guidance on how to use the material provided in the CHIA NSW and CHIA Vic Digital Transformation Pack.

The guidance documents and related Excel-based toolkits should be read and used in the following sequence:



Specific details of each document in the Digital Transformation Pack are as follows:

Sequence	Document	Description
1	Developing an IS / IT Strategy.pdf	Provides a stepped-out process for CHOs on how to develop information technology and information systems strategies. It provides a stepped-out process for the development of IS / IT strategies that may be adopted and applied. Some CHOs may well have a strategy defined which sets out their technology and system objectives, however, it is distinctly possible that there are those which do not. Whilst this document is designed for those CHOs which do not, it may also be useful for those CHOs which have already prepared their strategy to compare their approach to the steps and content provided. It takes you through the five key stages in developing such a strategy: • Stage 1: plan your resources • Stage 2: current state – assess where you are now • Stage 3: future state – where do you want to be • Stage 4: getting there – how do you get to where you want to be • Stage 5: compiling and documenting your strategy
2	IS / IT Strategy Toolkit.xlsx	Aligned to the strategy document, the toolkit provides series of templates to use in defining your strategy. The document 01 Developing an IS / IT Strategy.pdf indicates when the related worksheet in the toolkit should be used.
3	Assessing IT Improvements.pdf	Investigates and researches the available opportunities for IT improvements needed by CHOs and document the findings with recommendations. It is not the intention of this document to recommend any particular product or supplier that CHOs should use.

Sequence	Document	Description
		The objective is to provide sufficient information to enable CHO's to: 1. Make informed decisions on areas of value-added functionality and technology that could be utilised. 2. Directly engage with software suppliers who provide software products that can support their operations. Refer to this document when compiling your IS / IT strategy.
4	Digital Readiness Assessment.pdf	Sets out the approach on how to determine the state of a CHO's digital readiness and the results of a survey completed by 28 CHO's in NSW and Victoria. The intention of the digital readiness survey was to provide participating CHO's with an indication of their current position in relation to digital transformation against others, such that the outcome and results could serve as a useful tool to help build a business case for specific strategic initiatives. Determining a CHO's level of digital readiness is important as it is intended show the extent to which it is able to respond to the increasing pace of the ongoing changes in technology and innovation. It is important to note that the readiness model does not intend to identify where CHO's should invest neither should it be seen as an avenue for replacing strategy. It can however be used as a mechanism to inform the CHO's future strategy, where to focus and determining the resources and actions needed to achieve specific goals. The survey questions are included in 08 Digital Transformation Planning Toolkit.xlsx as part of the steps to be followed in prioritising your digital initiatives. For the 28 CHO's which responded to the original survey, this may be a useful exercise to revisit the survey questions and their original responses.
5	Persona Journey Mapping.pdf	Sets out a proposed persona journey mapping approach for CHO's. Explores how persona journey mapping has been used across various industries to measure and understand customer experience in relation to service delivery.

Sequence	Document	Description
		Documenting a journey map is the story of what happens along the way in the interaction with the CHO, how it happens, areas where pain points arise and how the persona <i>feels</i>. The journey map is designed to show what customers do in the moments of connection and interaction with the CHO and how they feel, what their behaviours are and whether they are satisfied. Likewise, it is also important to for CHOs to understand what happens within their organisation in response to a situation arising or an issue being reported and what happens in how the outcome is communicated. For CHOs, the specific business goal in customer journey mapping is not only to understand journeys in specific situations but to also determine how digital transformation can improve current contact channels and their service capabilities by: 1. Providing an enhanced customer experience for tenants in terms of how enquiries and service requests are responded to and resolved, as well as the time taken in doing so. 2. Improving internal procedures and efficiencies for staff in undertaking a range of operational tasks. This document therefore provides suggestions on the content and approaches CHOs can use in undertaking persona journey mapping exercises. Examples of journey mapping workshops are also provided to indicate how to document customer and staff journeys in relation to specific housing functions.
6	Persona Journey Mapping Toolkit.xlsx	Sets out a framework using situation stages for documenting persona journey mapping using proposed tenant and operational journeys covering: • Doing • Thinking • Pain points • Issues

Sequence	Document	Description
		• Improvements.
7	Digital Transformation Implementation Guide.pdf	Sets out the steps community housing organisations (CHOs) need to follow in defining and implementing digital transformation initiatives. Digital transformation is not just about technology. Its scope is much wider and includes: 1. A readiness to innovate 2. Dealing with cultural change 3. Creating new services and / or initiatives to cope with the current and emerging plethora of challenges facing CHOs today. In essence it is about: 1. Better ways of doing things 2. Creating value 3. Improving the customer / supplier experience 4. Automating tasks 5. Improving how services are provided in more efficient ways to deliver experiences in a co-ordinated, consistent and cost-effective way. 6. Building collaborative capabilities that can better support CHOs in delivering services 7. Fostering business resilience and capabilities for the future and thereby reinforcing CHOs' growth potential. 8. Focussing on people and processes as well as technology - the latter is the catalyst for helping or supporting you to provide these better ways of doing things and providing solutions. The potential benefits of digital transformation are: 1. An improved or optimised customer experience.

Sequence	Document	Description
		2. Innovative service delivery models. 3. Increased organisational agility. 4. Increased staff productivity through enhanced process efficiency and automation. 5. Improved business process. 6. Reducing operational costs. Refer also to 09 Case Studies.pdf to gain an understanding of the types of digital initiatives which different organisations in various countries have implemented and assess the merits of how these could be applied to your organisation in understanding what is possible.
8	Digital Transformation Planning Toolkit.xlsx	Provides a toolkit of templates on defining and prioritising digital objectives, defining projects aligned to objectives, assessing risk and defining a digital transformation roadmap.
9	Case Studies.pdf	Sets out a range of case studies across a selection of industries, with each study focussing on the challenge(s) that each organisation has faced, the solutions it implemented and the results that have eventuated. When planning your digital transformation initiatives, refer to this document for ideas on how digital solutions can be applied and note the lessons learnt.
10	Digital Channels and Utilisation.pdf	Digital transformation should not be seen as an avenue to dispense with the traditional methods of service delivery, neither should it be viewed as being just about technology. The impact of digital transformation will vary in relation to generational patterns of adapting and the ways of life. This is important in view of the impact on how your CHO currently operates; the initiatives you plan to introduce; how you could operate in the future and how such changes will be implemented. This document explores the use of digital and non-digital channels and provides an assessment on the areas of operation where digital transformation could add most value through effective utilisation, taking into account the associated implications that need to be considered.

Sequence	Document	Description
		It also takes into account the needs of all tenants, regardless of access or ability to use technology.
11	Cybersecurity.pdf	Sets out the cybersecurity implications that need to be considered when implementing digital transformation initiatives. This document should be read in conjunction with an Information Technology and Cyber Risk Assessment framework compiled by consultants Tesseract for CHIA NSW in July 2022.
12	Consortium-based Approaches to Procurement	Due to the size and resources of many CHOs, the need for a consortium-based approach to procuring software in the sector has been raised on various occasions, particularly for smaller providers, which may not necessarily have the resources to manage software procurement projects on their own. This document assesses the implications of a consortium-based approach to software procurement and implementation and covers: 1. Potential benefits 2. Factors to consider 3. Implementation approaches taking into account the variations in CHO processes and operations 4. Supplier feedback from those choosing to respond to a survey issued in October 2022. NB: this document does NOT make any comments or recommendations on the suitability of any supplier products, as CHOs should make their own assessments based on their evaluation.