



How to extract the right customer insights to drive an effective Estate Management strategy

The world is how we shape it

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Introduction

In this article our Estate Management specialists discuss the most important aspect of property management which focuses on understanding customer insights to make strategic decisions.

To optimise your property portfolio and create an outstanding experience for everyone, you need to fully understand the needs of people using your buildings, by identifying different core customer communities and aligning their needs. This goes beyond simply looking at key performance indicators and service level agreements.

Getting it right means obtaining and extracting the right customer insight.



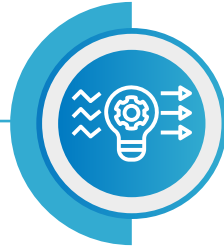
Barriers to understanding customer insight

There tend to be three main barriers to fully utilising customer data and analytics.



Understanding data assets

Many organisations struggle to understand what data they have about their people. Without having a joined-up view of how people are using buildings and without understanding their needs, it's extremely difficult to effectively service effectively.



Choosing the right solution

There are countless data and analytics tools available which makes it difficult for many property teams to decide which tools are best to solve their data and analytics issues. The choice can be overwhelming, and many teams find it difficult to make informed decisions.



Too much data, not enough insight

Many organisations have invested in 'off the shelf' tools which they hope will solve their analytics problems around the large sets of data they are capturing. The reality however is somewhat different. Without the right skills and experience, your team may not be using the data correctly to extract the right insights.

Unlocking the power of data

The good news is that there are some simple steps which can be taken to extract the value from data to inform better customer experiences. It starts with optimising the data that is available, understanding what is needed and addressing the gaps.



Undertake a data audit

By undertaking a data audit with your data and analytics partners and colleagues, you'll be able to see where building user data is being captured, stored and how it is being managed.

An audit may offer immediate opportunities to make improvements. It may also help identify potential untapped sources of future business information.

Data Maturity Assessments help to assess an organisation's level of data capability and to highlight areas where progress can be made.



Make your data clean and easy to use

Data strategies which underpin great building user experiences are built on clean, secure and easily accessible data, so insights can be extracted. In many organisations the volume, variety and velocity of data is mind blowing and is often stored in a wide range of places and systems. Data will often be muddled, inaccessible or only paint part of a picture required to extract value from it.

Investing in cleaning data involves thinking about the lineage of data and provenance of it and making sure it is fit for purpose.



Extracting the right insights

Many big data projects have been started, but a high proportion of them have stalled or failed to realise the benefits promised. Quite often this is due to the fact that these projects have been set up with an initial meeting with customer facing teams, who have then been left to their own devices. To utilise analytical tools effectively requires an understanding of key data management and extraction techniques, to accurately and effectively extract insights from thousands of data points. Often projects start with good intentions, but without the necessary skills and support to meet the objectives.



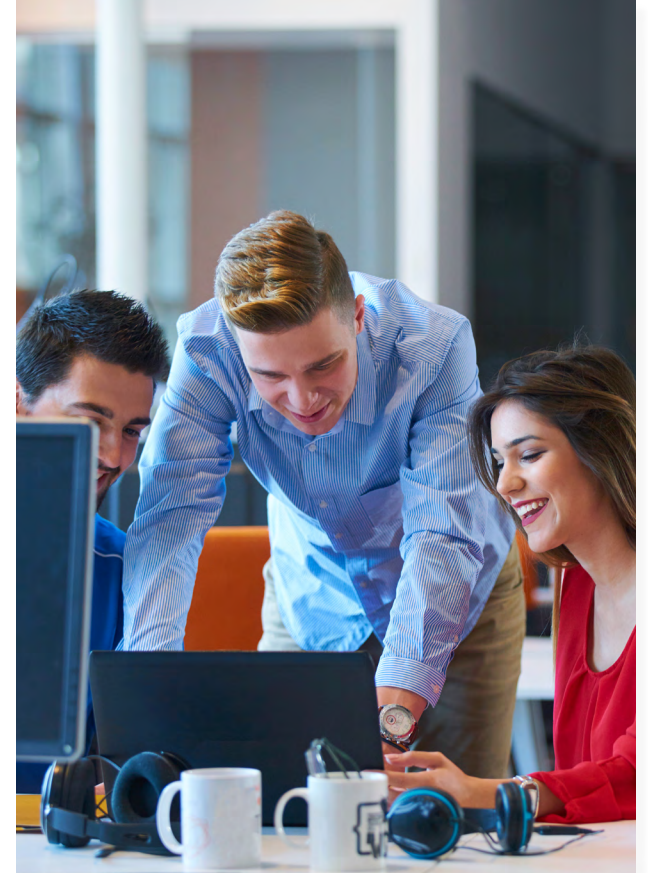
Build a holistic, user-centric view

Once your team has a deep understanding of its relational databases held in the organisation, it can then start to add new data sets and ask new questions to provide deeper insights. For example, there may be particular time of the month when building users are visiting, or you may be seeing spikes in demand for hot desks and specific Facilities Management requests. Adding different sources of data once you have the basics in place can be used to differentiate and optimise your building user experience.



Partner with a specialist

Partnering with a data and analytics specialist is worth investing in, to help your team understand which solution is best for your organisation and what needs to be put in place to extract the right insights to inform strategy and improve the customer experience across your estate, for all users.



At Sopra Steria we recognise that data and reporting are important, but we also know that this needs to translate into performance improvement to drive efficiency, accuracy and compliance.

Bringing data to life: A case study

Here at Sopra Steria, we bring a multitude of different data from disparate sources and systems together to provide a holistic picture. A recent example of this is when we worked with Historic Environment Scotland (HES). The team at Sopra Steria designed a single state-of-the-art digital service to increase access to the Historic Environment, engage new audiences and provide users with a holistic picture of Scotland's rich cultural heritage using digital channels.

The project was focused on bringing a multitude of different data about the buildings, monuments and places, and also the history, the language, the culture and the industries of Scotland. By undertaking a data audit, we were able to provide insight on HES' current and target data maturity. We then analysed both qualitative and quantitative user research and worked alongside stakeholders and advocates to co-create a vision of the future digital service. Finally, we scoped the roadmap to design, build and implement **Heritage Hub Scotland (HHS)** to engage more people, more effectively with Scotland's Heritage. At every stage, the strategy was clearly focused on understanding and meeting the needs of the end user and finding ways to extract insight and data in a relevant and meaningful way.



HISTORIC
ENVIRONMENT
SCOTLAND



How Sopra Steria can help

By extracting data-driven insights about the core components of your estate, we then provide consultancy at each stage of the transformation journey to achieve desired business outcomes.



Developing a feedback loop

As well as tracking buildings performance in metric terms (energy usage, waste management, heating and cooling etc.) we also recommend capturing regular feedback from the people who use your spaces, which provides insight that shapes the overall building strategy.



Tracking customer experience (CX) and satisfaction about how end user customers feel about their experience.

- **Transactional CX:** implementing transactional automated customer satisfaction ratings for services such as repairs and maintenance and other workplace services.
- **Survey-based CX:** capturing Net Promoter Scores as well as monitoring feedback loops such as Informed Client Surveys to generate a richer picture of the internal and external customer experience.
- **Systems Integration CX:** using data from the wider network including supplier partners.



A balanced view, bringing together a balance of SLA and XLA metrics.

- Working with our clients and their building users we help bring together a balance of SLA and XLA (Experience Level Agreement) metrics to ensure the estate's team and end user customer experience are fully considered to achieve an improved customer experience.
- Better still, Sopra Steria can provide this information from an unbiased and independent viewpoint which will allow decisions to be made impartially from the supply chain.



A user-centric approach to ensure continuous improvement.

- Our customer-centric front end Help Desk services are already integrated with large public and private sector clients.
- Our approach is both aligned to the customer experience objectives of our customers but also with supporting the gathering of data and feedback to support continuous improvement of the services provided.

Implementing a people centric approach can be invaluable to your organisation.

Data without actionable insight is, after all, worthless. By combining customer insights with the more factual 'hard' data, and by implementing an outstanding user experience for everyone across your property portfolio will derive many business benefits not just financial ones.

If everyone using your spaces are comfortable and happy in their environment, you are more likely to retain and attract both internal and external customers, and you will also be better equipped to support the overall wellbeing of employees, customers and suppliers.

This in turn will enable you to provide a differentiated user experience, which will build your organisation's profile and reputation, drive efficiency and deliver long-term growth.





More Information

Sopra Steria helps clients to optimise their physical estates through true digital transformation. We have over 35 years' experience in Estate Management digitalisation across the public and private sectors. Our proven approach to creating an Estate Management ecosystem helps clients to adopt new technologies and integrate existing processes and systems to streamline the complex and varied tasks involved in Estate Management, while maximising efficiency and sustainability.

For more information on the property services we provide to public and private sector organisations please email us at EstateManagement@soprasteria.com.

Or you can visit us at <https://www.soprasteria.co.uk/industries/digitalisation-transforming-estate-management>

We look forward to working with you.

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