

Housing Foundation

Empowering a New Way of Working

Housing Foundation

Scaling Mission Impact: How the Housing Foundation Automated its Way to a Customer-Centric Application Process

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BACKGROUND

Housing Foundation (HF), a charitable organisation dedicated to helping families achieve homeownership through shared ownership programmes, faced a critical operational bottleneck that impacted the effectiveness of their mission.

over 300
monthly expressions of interest

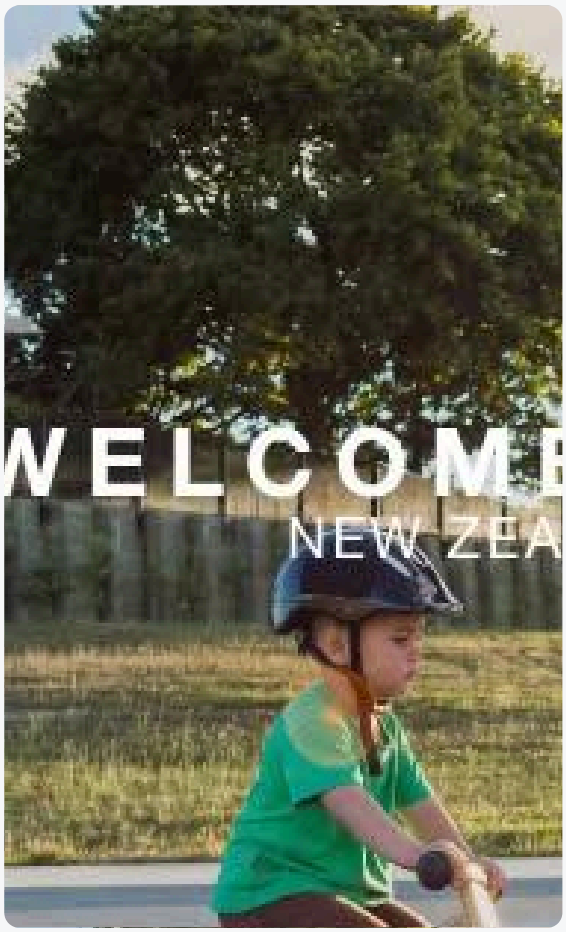
two months
using its QLOAD® methodology

half-time role
staff capacity equivalent

20 hours
per week in staff capacity

With over 300 monthly expressions of interest—and only one staff member manually processing all applications—response times lagged and sometimes opportunities were lost. Acutely aware that every delayed response represented a potentially lost opportunity to help a family into their own home, HF contacted Quanton.

In just two months, Quanton, using its **QLOAD®** methodology, transformed the organisation's front-end operation, delivering a more customer responsive process, a conversion rate improvement, and significantly better visibly of all KPI's, while freeing up significant staff capacity equivalent to a half-time role.



MANUAL PROCESSES VS. MISSION IMPACT

The Housing Foundation's challenge was one many growing organisations eventually face: operational processes hadn't scaled with demand.



> **"We had a process that wasn't fit for purpose as we moved forward and grew as an organisation," says Greg Freeman, Sales and Community Engagement Manager with NZHF.**

"We weren't as responsive to customer enquiry as we wanted to be—the timeliness of responses was important to us but a labour intensive process was a stumbling block to achieving any improvement."

"We also suffered through an acute lack of information—the data that would enable the management team to take timely and appropriate decisions. We were very interested in understanding our performance, breaking down in real time the composition & numbers of registrations & applications, and the time taken for people to move through different stages of our process."

Quantifying the Problem

Quanton's initial assessment revealed a handful of key operational inefficiencies. Each month the Foundation received well in excess of 300 expressions of interest through its website, all of which had to be manually processed by a single staff member.

Other significant bottlenecks included the fact that ineligible registrations often required a manual review to be certain the ineligibility assessment was true. Additionally, registrations classified as 'maybe eligible', required at times extensive follow-up efforts still yielded low response rates .

14%
of annual staff time

117 hours
per annum wasted

Overall, the Foundation was dedicating 14% of annual staff time to triage activities, with 117 hours per annum wasted processing applications that were never viable.

THE HUMAN IMPACT

Beyond the operational metrics, painfully manual processes were creating genuine customer service gaps, directly impacting the Foundation's ability to serve families seeking homeownership opportunities.

> **"If we fail to respond to customer enquiry in a timely manner it's disappointing for them and we potentially lose customers as a result. People lead busy lives these days and their attention can quickly move on and our opportunity to engage is missed," says Freeman.**



QLOAD® METHODOLOGY IN ACTION

DISCOVERY AND VALUE STREAM MAPPING

Quanton's engagement began through a personal connection—Freeman's wife attended a presentation by Garry Green, Quanton's Managing Director, and recognised the possible potential for the Foundation's business.

"What Garry was talking about was very interesting to us," Freeman recalls. **"We immediately saw that Quanton's involvement could address our problem and we also liked the down-to-earth approach. Quanton's obvious experience, having worked with many other companies before, was very reassuring. "**

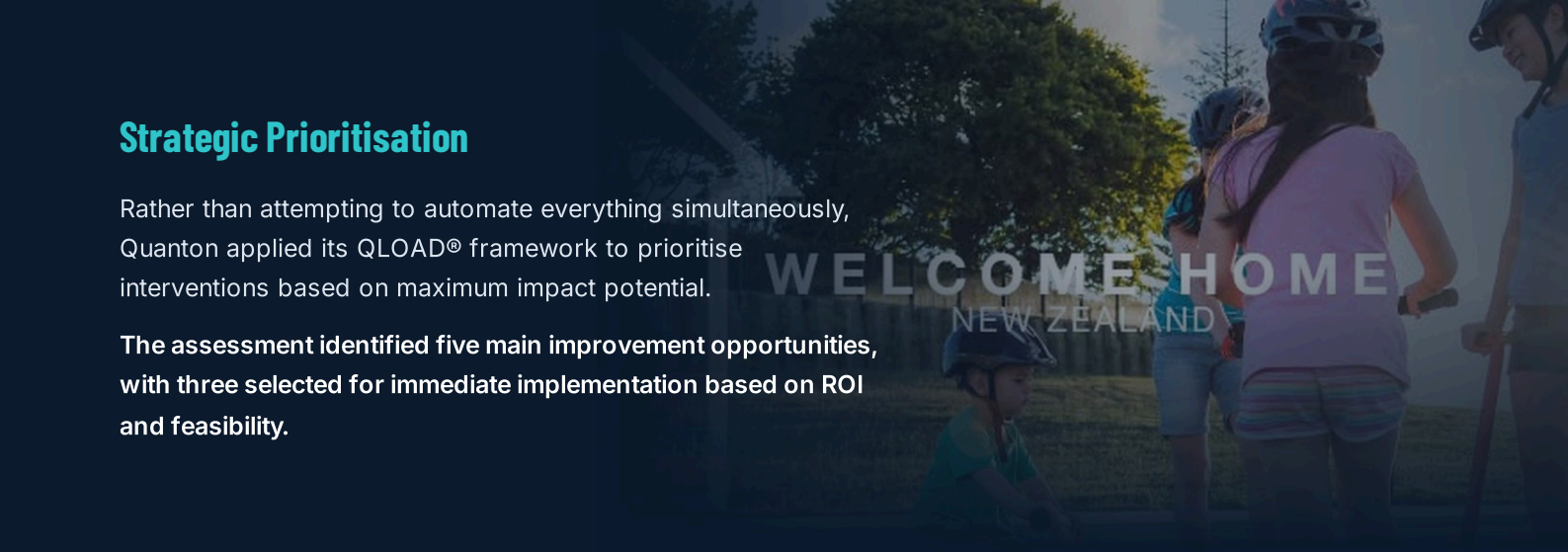
The project commenced with Quanton's signature Value Stream Mapping approach. Quanton ran intensive two-day workshops with the Foundation team, walking through the entire process from start to finish. The sessions explored how the process worked in practice, what outcomes the team wanted, how they envisioned it in the future, and where current pain points and inefficiencies were holding them back.

Detailed process mapping revealed the full customer journey from initial website inquiry through to housing allocation, quantifying the time spent on each task and identifying specific bottlenecks and waste points.

Strategic Prioritisation

Rather than attempting to automate everything simultaneously, Quanton applied its QLOAD® framework to prioritise interventions based on maximum impact potential.

The assessment identified five main improvement opportunities, with three selected for immediate implementation based on ROI and feasibility.



IMPLEMENTATION: THREE-PRONGED AUTOMATION STRATEGY

01

AUTOMATED ELIGIBILITY TRIAGE SYSTEM

The centrepiece of the solution was an intelligent triage system that automatically assessed application eligibility using refined business rules. As soon as a registration is submitted through the website, the system applies criteria such as income, household size, and location to determine eligibility.

This automation eliminated the need to manually review the 40% of applications that were immediately ineligible, freeing up significant staff time for higher-value activities.

02

INTELLIGENT FOLLOW-UP AUTOMATION

The second component addressed the challenge of maintaining engagement with prospective applicants. An automated email sequence system was implemented, triggered by status changes in their existing Zengine system.

The follow-up automation operates on a sophisticated schedule—sending follow-ups every two days, five days, six days, and four weeks based on responses received. If no response is received after one month, the application is automatically marked as 'no response', ensuring nothing falls through the cracks.

03

REAL-TIME APPLICATION DASHBOARD

The final component provided the visibility that had been missing from the Foundation's operations. A comprehensive dashboard was developed to track:

- Overall application statistics by eligibility status
- Time taken for application processing from submission to completion
- Status transition analysis showing average days to move between stages
- Demographic profiling including age, ethnicity, and income analysis
- Side-by-side comparisons of processing efficiency across different applicant profiles

IMPACT ACROSS MULTIPLE DIMENSIONS

Conversion Rate improvement

With the automation in place we are certainly seeing an improvement in conversion rates.

“With quicker responses and connections with customers established earlier in the process it appears that our conversion of registrations to applications has improved ,” says Freeman.

“Early figures show we’re on an upward trend in this metric.”



OPERATIONAL EFFICIENCY GAINS

Beyond conversion rates, the Foundation has also achieved significant operational improvements including:

- **Time savings equivalent to 20 hours per week** in staff capacity
- **Elimination of 117 annual hours** previously spent on ineligible applications
- **Improved response times** to prospective applicants
- **Enhanced data visibility** enabling better management decision-making

Rather than eliminating roles, the automation has elevated the work, allowing staff to focus on higher-value activities that better serve the Foundation's mission.

The successful implementation has created organisational momentum for further transformation.

> **“It’s a success story because it has worked—what was promised has really been delivered,” Freeman says. “That has made the organisation more confident about bringing change in and facing a more automated future.”**

Additional opportunities for Phase 2 implementation currently include:

- AI-driven call recording and analysis capabilities
- SMS functionality for customer communication
- Further CRM system enhancements
- Additional workflow automation opportunities

MISSION AMPLIFIED

The results speak for themselves: an increase in conversion rates, faster response times, better customer engagement and staff freed to focus on higher-value work.

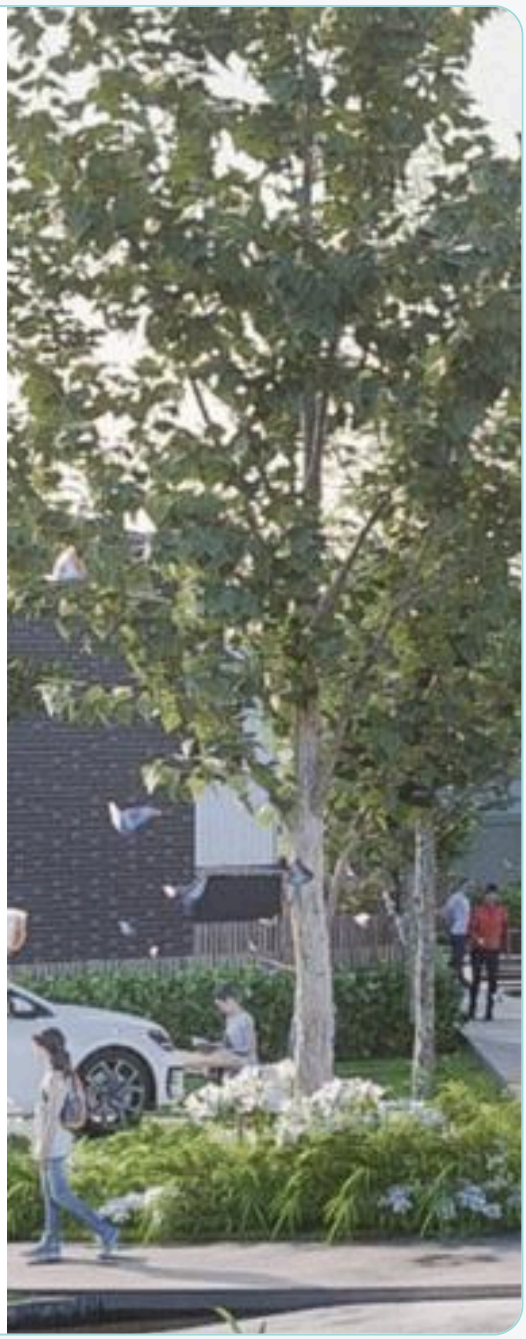
Most importantly, these gains translate directly into more families achieving homeownership—the heart of the Foundation's mission.

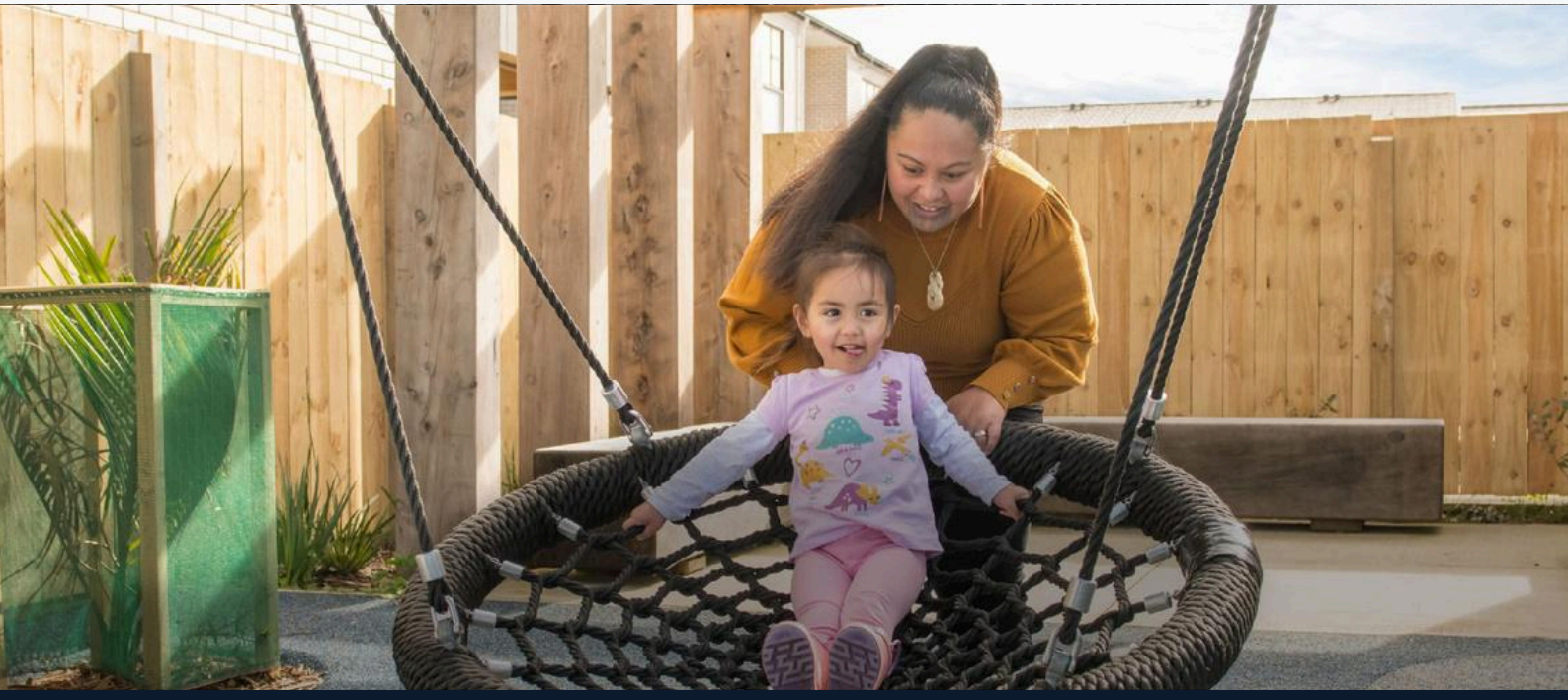
It's a powerful example that, through Quanton's careful analysis, methodology, and targeted automation, it is possible to scale impact without sacrificing quality or mission focus. The key lies in using technology thoughtfully: to amplify human capability, remove waste, and empower staff to deliver their best work.

For organisations seeking to serve more people effectively with limited resources, this case study provides something of a roadmap at its most fundamental: start with a focus on measuring, understanding, and optimising operations, then apply automation where it makes the most difference.

In doing so, mission-driven organisations can multiply their impact—while staying true to their purpose. Quanton makes AI and automation work for people, creating pragmatic solutions that drive real business value.

Contact Quanton today: 0800 639 646 or visit quanton.ai.





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