

# MERLIN HOUSING SOCIETY CASE STUDY

Merlin



## MERLIN HOUSING SOCIETY

Owning or managing nearly 9,000 properties, Merlin Housing Society are a medium-sized housing provider and developer operating along the M5 corridor from Bristol to Stroud. Their overall goal is to be a world class organisation providing homes in communities people aspire to live in.

## CHALLENGE

Prior to implementation of a health and safety software system, Helen Jones, SHE Assurance Manager with Merlin Housing Society, was struck by how disorganised their compliance documentation was. With inconsistent formats throughout their documentation and an overload of spreadsheets, Helen's objective was to move away from a paper-based system and move to a cloud based system in which all documentation could be centralised and readily accessible. Helen also wanted a system that could present timely and quality reports to the board at monthly meetings and prove duty of care across all her sites.

## SOLUTION

Effective provided an easy-to-use cloud based system where Helen and her team could easily keep track of training, risk assessments, auditing and most importantly provide one central hub for all health and safety information.

“WE, AS A COMPLIANCE TEAM NOW HAVE AN OVERSIGHT OF ALL DOCUMENTATION AT THE TOUCH OF A BUTTON”

**PROVING  
DUTY OF  
CARE ALWAYS  
READILY  
ACCESSIBLE**

## RESULTS

Since full implementation of the Effective solution, Helen is delighted with the new control she has in conducting her job and managing her compliance team.

One of the first benefits Helen identified was how efficient the implementation stage was. She noted how flexible, easy and quick the transition of compliance documentation was, with everything transferred within a couple of weeks.

One of the biggest benefits Helen singled out was how much time and effort was saved in handling her audits. Where she and her team used to have to sit down with individual managers and pull evidence, mostly paper-based, out of them, they can now run through the auditing process at the touch of a button. Now, with all compliance documentation in one centralised location, they are in a position in which they don't have to even contact a manager to conduct an audit.

The ability to report compliance efficiently was something Helen and her team were unable to do before Effective was implemented. Now, as Helen made clear, Effective's analytics and BI are the key features available to not only herself, but to Merlin Housing Society's board of directors and executive team. This functionality has been the greatest index in the justification of the spend on Effective Software, with clear reports and graphs showing the impact that having a cloud based health and safety system can have.

The ability to prove duty of care was also of great concern to Helen and her team prior to software implementation. Helen noted how before the software was implemented, if they ever had to prove duty of care it would not be readily accessible or auditable and would be a tedious process. With Effective Software, Helen has noticed a clear improvement in the time and effort saved during the process of proving duty of care.