Checklist for enabling hubs
Customer service and operations

It's not easy to set-up and run a brand new organisation tasked with responding to all manner of enquiries from the public to the press. Here are some initial steps to help you get the basics right.

☐ Buy a domain

A domain means you can get a name for your website or email address that just belongs to you, such as communityledhomes.org.uk. You can check if your desired domain is available, and you can purchase it, through 123-reg.co.uk. Not-for-profits often use .org.uk.

Once you've got a domain you can get a website and a shared email. You may already have an email address so you could get a domain to match or it's fine to have a different email and website if your chosen email name isn't available as a domain.

☐ Build a website

Get a website set-up and include some of the following:

- History of your hub and the support it can provide
- A short community led housing explainer (you can refer people to the Community Led Homes site for more detail)
- Details of any projects you are working on
- Team member biographies
- A contact page
- Details of your legal structure
- Details of your funders

Make sure your contact details are easy to find. It's harder to help with someone who is already frustrated and confused when they first speak with you so remove barriers to your users getting the information you know they'll need.

Remember that some of your funding from Community Led Homes can pay for a nice website and some cheaper and more user-friendly options include Wordpress, Weebly and Squarespace.

Funding available!

☐ Get a hub email address

- Get a shared email inbox with one email address you can all access, such as info@birminghamcommunityhomes.com or enquiries@emclh.co.uk, and check it regularly! You can have these emails forwarded to your personal email address for ease of access, but it makes it easier to receive general enquiries if there's a general email address for people to use.
- Try to reply with an email address that clearly shows your connection to your hub, so that people don't email one organisation but seemingly get a response from another.
- There are lots of providers of **free** business email services to help you manage this, but the industry standard is Google who offer their G Suite (email and document tools) for free for not-for-profits.

☐ Set-up an automatic reply on your email

Help to manage expectations by including the following:

- An explanation that your staff are part-time/volunteers/often travelling and so there may be a delay
- An estimate of how long it'll take to get a response from you
- Links to further reading or support they can pursue in the meantime (such as links to learn about community led housing or about the history of your hub)

Along with setting an auto response, you can also list your general availability on your 'contact us' page. List phone-line hours or the fact that your staff are part-time/volunteers/often travelling. People won't mind waiting to talk to someone if they know that in advance.

☐ Get a phone line

You'll need to make it easy for people to talk to you but running a phone-line can be difficult if you don't have an office or the ability to have your phone manned consistently. Here are some workarounds:

- **Set up call-forwarding**
  More sophisticated phones have a call forwarding function. You can create a schedule of 'on-call' staff and transfer the number amongst you.
- **Get a shared online phone number**
  You can pay for a 'virtual' phone number that can connect to your computer or smartphone. This likely has similar costs to paying for line rental and is a flexible option.
- **Clearly advertise different phone numbers for different purpose**
  If it's not possible for you to get a shared phone number, you can simply list on your website different people and their job titles with a description of who to contact for which enquiries.

☐ Get a CRM or contact database

Find and record your contacts easily using a database or Customer Relationship Manager (CRM). You'll be able to keep a record of primary contacts for groups along with their roles and even their project focus and progress. As a not-for-profit you can use Salesforce for free.

☐ Brush up on GDPR and get a data protection policy

Make sure you aren't sending emails and newsletters to people who haven't consented to this as you'd be in breach of General Data Protection Regulation (GDPR) and could be fined by the ICO. This also reduces trust with your audience. NCVO has some [good guidance](#).

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