

NETWORK STADIUM HOUSING ASSOCIATION LIMITED
PERFORMANCE COMMITTEE – WEDNESDAY 11 SEPTEMBER

SCRUTINY PANEL – CUSTOMER ACCESS

PREPARED AND PRESENTED BY:

Prepared by:

Resident Scrutiny Panel

Presented by:

Scrutiny Panel representatives

██████████, Head of Service Improvement and Customer Learning

PURPOSE AND SCOPE:

This report is produced for the Association by resident members of the Scrutiny Panel. The report details the background to their work, methods used and conclusions from their scrutiny into Network Stadium's approach to Customer Access. This report is accompanied by a service improvement plan for review and approval at Performance Committee.

RESOURCE IMPLICATIONS

Potential resource implications will be linked to Network Stadium's response to the recommendations for service improvement detailed in this report. This may include, but not exhaustive of:

- Staff time
- Financial investment to support training and resources

STRATEGIC IMPLICATIONS

NSHA Business Plan 2012-13:

Point 12: Review of Customer Access

Point 36: Develop the approach to co-regulation for NSHA, utilising the feedback from the pilot conducted

Other strategic implications will link to the operational practice of Network Stadium in their response to recommendations to improve Customer Access.

RISK: FINANCIAL, OPERATIONAL AND REPUTATIONAL

The risks of failure to effectively implement/address the recommendations put forward by the Pilot Scrutiny Panel are identified as follows:

- Diminished capacity to implement the service improvement recommendations proposed by the Panel members
- Diminished value for money of the Scrutiny process
- Potential decrease in resident satisfaction through not acting upon

residents' views.

SUMMARY OF RESIDENT AND DIVERSITY IMPACT

A key outcome of the Resident Involvement review will be to ensure all involvement opportunities are representative of our wider customer base. This will impact on the future recruitment process for the formal Scrutiny Panel.

RECOMMENDATIONS/NEXT STEPS

Performance Committee to review service improvement recommendations and plan and approve for implementation.

Please see item 9.1 – 9.12 (pg. 11-12) in the body of the report for details of the recommendations provided by the Scrutiny Panel and Appendix 1 for the service improvement plan.

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SCRUTINY PILOT – CUSTOMER ACCESS

1. Introduction

1.1 During July and August 2013, we undertook a Scrutiny of Customer Access to Network Stadium.

1.2 Customer Access is a key component in the success of the service Network Stadium provides to its customers. It is important to understand how customers access and how customers wish to access the services that Network Stadium provides. Effective access arrangements impact on customer satisfaction with the service.

1.3 It was also chosen as a priority for Scrutiny by Network Stadium as a key aspect of this year's Business Plan. The following drivers were identified in selecting this scrutiny area:

- **Links to business plan**

- Value for money - the cost incurred by Network Stadium in dealing with non-core queries and inefficient self-service opportunities is the highest in the Network Housing Group
- Business plan 2013-14 task 12 – 'customer access review'.

- **Leadership Factor**

- The results of the Leadership Factor survey (October –December 2012) showed resident satisfaction of 70.21% when asked 'How easy is it to contact Network Stadium?' This was the lowest satisfaction score within the Network Housing Group.

- **Resident Business Planning Group 2nd October 2012 – Feedback:**

- Service standards have been poorly communication, which has led to residents becoming unclear as to what to expect from Network Stadium's range of services
- Customer relationship management needs to be improved and feedback to residents needs to be handled more productively
- Not all of Network Stadium's services are advertised sufficiently using key customer access points (i.e. website, notice boards, magazine etc).

1.4 Future Scrutinies will be decided by *The Hub*, the overall Resident Involvement body for Network Stadium.

1.5 The report sets out the background to our work, the methods used, what we found, conclusions reached and recommendations we wish to make to the Performance Committee in respect of Customer Access in the form of a service improvement plan. It also reflects on the experience of the Scrutiny,

further lessons learned and recommendations that we wish to make for future Scrutiny arrangements.

2. Background to Resident Scrutiny

2.1. Since the new Regulatory Framework was introduced under the Housing and Regeneration Act 2008, the role of an external Regulator of Housing Providers has diminished and it is expected that ensuring that all Standards are met and exceeded is achieved through *co-regulation* undertaken by the Provider and its residents. This has been greatly reinforced since the election of the Coalition Government, the abolition of the regulator, the Tenant Services Authority, and the passing of essentially a 'backstop' regulatory role for the national *Consumer* Standards to the Homes and Communities Agency.

2.2. Following the successful Scrutiny of Anti Social Behaviour Case Management in the earlier part of this year by a Pilot Network Stadium Panel, that Panel joined with the established Panel of Willow Housing and Care to form a new wider team.

3. Process followed for the Scrutiny

3.1. The following methods were used in our Scrutiny programme:

- Briefing and interviews with Director, Managers and operational staff
- Conducted a Resident Satisfaction Survey
- Review of documents
- Discussion with Communications Officer regarding the Communications Strategy, website, refreshed website and use of social media
- Interview with Sheltered Housing Scheme Managers
- Meeting with Resident Quality Inspectors
- Considered the report of the Mystery Shoppers
- Best Practice research

3.2. Our work was undertaken with the support of the Community Engagement and Investment Team as appropriate and on a confidential basis and those staff members with whom we met and discussed Customer Access. This was to ensure the independence and objectivity of our work as Residents. We were also supported by an independent external adviser at the start, midpoint and conclusion of our Scrutiny programme.

4. Pre Scrutiny

4.1. As is normal practice in a Resident Scrutiny we submitted in advance of our programme, a list of requested documents to study as a part of the process. The documents were provided as requested.

5. Scrutiny Panel 'care'

- 5.1. A key feature of Scrutiny should be to ensure that those undertaking it are well looked after and respected. We considered that the quality of Scrutiny Panel 'care' was good. We were pleased to have, generally, proper accommodation for our work.
- 5.2. For the most part we met in a glazed office that meant we were seen by staff on that floor. We felt that this was helpful as it enabled staff to be familiar with our presence and that a Scrutiny was taking place.
- 5.3. All arrangements for the Panel worked well, including transport, meetings, rooms and catering undertaken by our designated Community Engagement and Investment Officer.

6. Findings

6.1. Briefing and interviews with Director, Managers and operational staff

- 6.1.1. In our discussions we were advised that there is no strategy or policy in place regarding customer access.
- 6.1.2. The existing Contact Centre had just been separated out from Property Services operational management. Its function is not only to receive calls, but also to be a problem solving resource for the Group.
- 6.1.3. We were advised by staff that we met that there were shortages of staff, no permanent manager in place (an interim manager was present). This was leading to reduced performance and callers being queued. We learned that there is no established training programme.
- 6.1.4. We noted that methods for staff recruitment to the centre had not always been effective in the past, but now there are plans to introduce better methods, such as role play exercises, case studies and broader advertising of vacancies (not using Recruitment Agencies).
- 6.1.5. There are also plans for the new website to be linked into the contact centre to make the Group more accessible. A feature of this is that Google is now used for translation purposes as opposed to previous more limited arrangements. This is considered to being more cost effective.
- 6.1.6. The Contact Centre, together with other parts of the Group, is currently being reviewed for being 'fit for future'. Presently there seems to be some doubt about this which is being addressed by the recruitment matters referred to above together with training, attendance management, introduction of 'super users' (higher trained staff in the centre all the time), staffing levels and updating of data.
- 6.1.7. Other initiatives we were briefed on were a move to a less ordered distribution of calls based on a ranking system, (i.e. calls being put through to operatives deemed better able to deal with).

6.1.8. We were told that a substantial percentage of the volume of calls to the Contact Centre are generated by follow up calls for unresolved issues or poor service.

6.2. Resident Satisfaction Survey

6.2.1. We spoke on the telephone with thirty one residents of Network Stadium about the quality of their contact and experience of their contact with Network Stadium. The majority of contacts regarded repairs, together a mixture of repairs and housing management issues.

6.2.2. A large number of those we spoke with regarded the Contact Centre as less than satisfactory. Particularly because of queuing times, follow up and lack of problem solving. There is a concern about the extent to which people feel listened to when they call the contact centre.

6.3. Review of documents

6.3.1. We read a number of documents concerning Customer Access. For example *Culture Club Guide* that sets out, amongst other things, how the organisation puts residents at the heart of what it does.

6.3.2. A range of other documents included *The Leadership Factor*, Service Standards, A guide to Scrutiny, Performance Report, Customer Service Review, Learning from Customer Feedback, Communications Strategy, Service Improvement Plan, Guide as to how we serve the customer, another Providers' Scrutiny Report on Customer Access, a Good Practice Guide on running Contact Centres.

6.4. Discussion with Communications Officer regarding the Communications Strategy, website, refreshed website and use of social media

6.4.1. We were advised that the sum total of customer perceptions is not known. This is a key feature of the Communications Strategy. It was explained that the Strategy was a new initiative, with this aspect is yet to be worked on.

6.4.2. It was explained that the new home page on the website is now more interactive and pleasing to the eye.

6.4.3. We discussed other means of access for residents other than the Contact Centre, such as door knocking, rent surgeries and the website.

6.4.4. The Communications Officer described the current introduction of the new Customer Relationship Management (CRM) system, eventually planned to replace the established *Northgate* system. This is intended to ensure that customer access and service is significantly improved.

6.4.5. Also being worked upon is the fuller use of social media. Examples were given about how *Twitter* can be used to encourage better customer access.

6.4.6. We were advised that the *Readers' Group* that is made up of residents will be made more effective use of in the future.

6.5. Interview with Sheltered Housing Scheme Managers

6.5.1. The Sheltered Housing Scheme Managers thought that customer access is fairly good, but that residents have to wait on the telephone, at their own expenses, too long. Residents often ask Scheme Managers to call on their behalf. The Managers thought that introduction of a Freephone in Schemes should be introduced.

6.5.2. It was mentioned that Contact Centre staff should be better aware of vulnerable residents calling.

6.6. Meeting with Resident Quality Inspectors

6.6.1. We were pleased with the high standard of their report prepared for us by the Inspectors arising from the variety of methods that they used in their programme.

6.6.2. They found that:

- CRM is in the first phase of implementation. Currently all staff are using the system.
- From the offset, they identified that this system has been only recently implemented. In terms of usage there were 3,578 open activities and 2,186 open cases on the CRM system last month.
- Front-line staff are still reliant on the old system (Northgate) to manage repairs, and to get more accurate resident information. Because staff are still using Northgate, which they are very familiar with, some are struggling to adapt to the CRM system. There are occasions where they may need to use Northgate as new information can take up to 24 hours to be uploaded to the new CRM system.
- At present there seems to be trust issues with the system because of the 24 hour delay. This lag in communication means that users have to create a new system to carry out their tasks which does not make support ease of workflow and leaves room for error.
- There seems to be no clear system to ensure that the repairs that are carried out are completed and that the residents are satisfied. CRM cases are closed by Network Stadium staff once they have passed on a task / activity to a contractor to deal with. However many of these cases are not ready to be closed and as a result many customer call backs and complaints occur. Contractors are unable to access CRM system even to just add notes.
- Contractors can access Northgate however staff believe this is not always properly utilised by contractors. There does not seem to be an effective communication or follow up system between the Contact Centre and contractors in regards to resident queries / cases. The communication process between the contractors and Network Stadium staff seems to mainly be residents being put on hold while on the line while Customer

Contact Staff make a telephone call to contractors to chase queries. This is a long and ineffective process that needs to be addressed with some lack of customer focus during contact with Network Stadium and contracting staff. The focus seems to be more on processes.

- The CRM system makes it easier for each staff member to be accountable for actions and cases assigned to individual residents. It allows for easier internal communication between Network Stadium Staff.
- Staff use various windows on screen and various IT applications in one single customer interaction. This is time consuming and the customer is often prone to be left on hold.
- At present the system is very slow. This could be due to the servers opposed to the CRM application itself. Nevertheless it is affecting the communication between the residents and staff.
- The system is still lacking in some areas for staff in relation to workflow management. Some fields still need to be added to save time and improve record keeping, tracking and reporting.

6.6.3. The Quality Inspectors also interviewed residents and found:

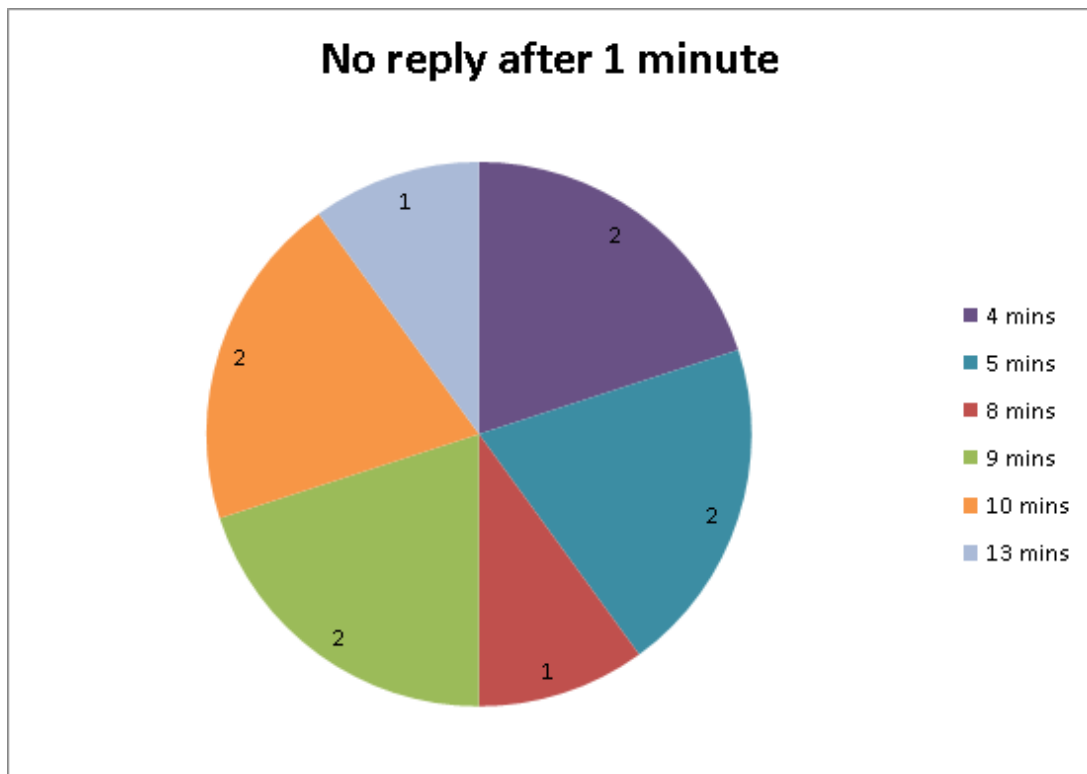
- Residents had not noticed any significant changes to the services that they were given, over the past month.
- Overall they felt that queries were dealt with. However residents felt that they had to wait too long to get through to the Contact Centre, some residents had tried on several occasions.
- When asked if there were any changes they wanted made they would like staff to go on customer service training as they found staff rude at times.
- Overall the fifteen residents they surveyed were generally happy with their recent contact with the association. Eleven thought the service was good, two felt it was average and two thought it was poor because of outstanding repairs that had not been carried out by contractors.

6.7. **Considered the report of the Mystery Shoppers**

6.7.1. The Resident Mystery Shoppers found that:

- 85% of calls were not answered within the service standard of 20 seconds – see diagram below
- 2 calls were abandoned
- 4 calls were made before midday
- The majority of calls were made after midday

6.7.2. Diagram below shows the number of minutes the call was answered in



6.7.3. Calls - The Mystery Shoppers concluded:

In relation to the initial greeting:

- Out of the 10 calls made (90%) were answered with a formal greeting (There is no set script who to answer calls)
- None of the callers were asked their name or address at the opening of the call

In relation to the closing of the call:

- In general the mystery shoppers felt that staff did not check if the response/ information had been fully understood by the caller (40%)
- The mystery shoppers also said they were not asked if there was anything else they could be helped with (30%)
- The callers were in most cases thanked for their call (90%)
- One caller was particularly pleased that the call was closed with 'Have a lovely rest of your day'

In relation to the enquiry itself:

- Where possible staff did try to deal with the call at first point of contact (50%)
- In general Mystery shoppers felt that their enquiry was not answered – Mystery shoppers reported limited information and advice was available on specific areas
- In general the callers felt staff were very helpful and offered as much information as they were able to at the time

- All callers apart from 1 were informed if they were being put on hold whilst staff obtained further information although on a couple of occasions the caller was told to 'Bear with me' and no explanation given

6.7.4. Emails - The Mystery Shoppers concluded:

In relation to the initial response:

- 75% of email enquiries received an initial response within 24hours
- 25% failed to receive a response

In relation to the enquiry itself:

- 50% of email enquiries were dealt with the same day and settled
- 25% of email enquiries never received a response

6.7.5. Overall customer satisfaction - The Mystery Shoppers concluded:

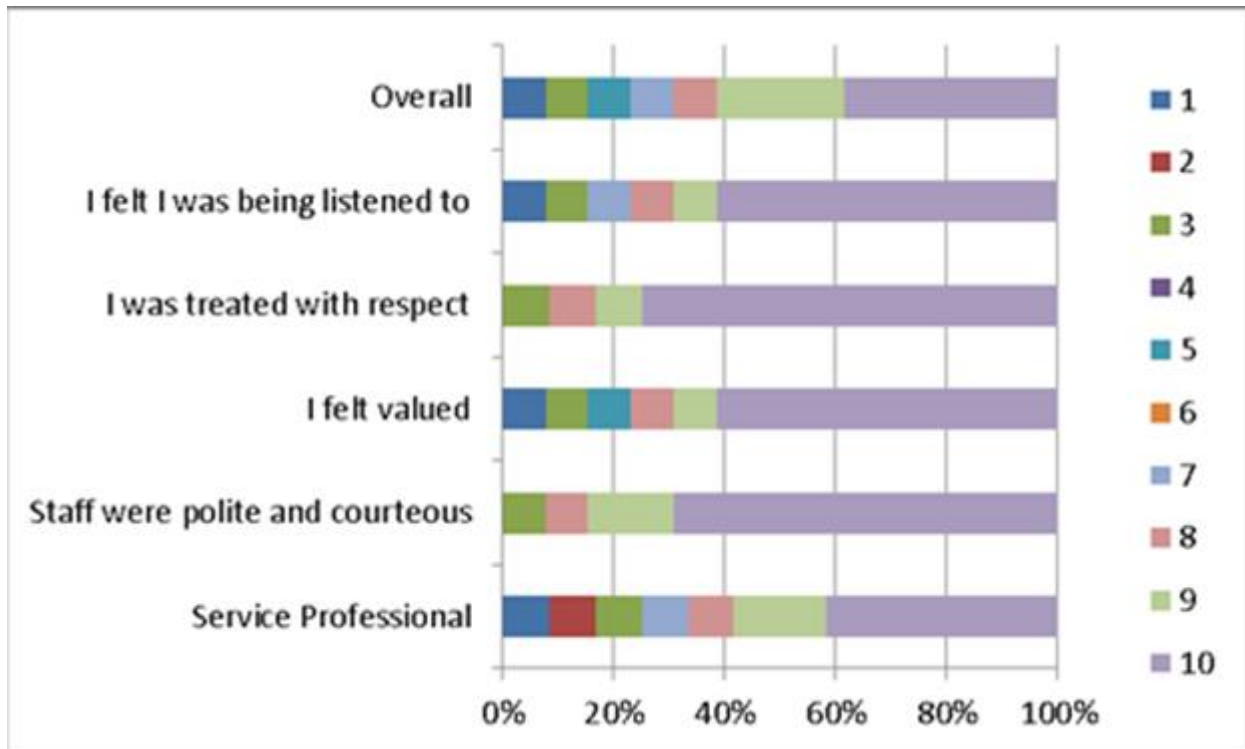
In relation to overall quality of contact:

- In general the quality of contact was high and this is reflected in this area. Most shoppers gave a rating of 8-10 for most areas
- There was however low ratings given where information was below expectations – at first contact

The results shown in chart form below

1=poor 10=excellent	1	2	3	4	5	6	7	8	9	10
Service Professional	1	1	1	0	0	0	1	1	2	5
Staff were polite and courteous	0	0	1	0	0	0	0	1	2	9
I felt valued	1	0	1	0	1	0	0	1	1	8
I was treated with respect	0	0	1	0	0	0	0	1	1	9
I felt I was being listened to	1	0	1	0	0	0	1	1	1	8
Overall	1	0	1	0	1	0	1	1	3	5
Totals	4	1	6	0	2	0	3	6	10	44

The same results in bar chart form



6.7.6. The Mystery Shoppers' overall conclusions were:

- That there is a need to improve response rates however this did not affect the overall quality of contact rating
- Where mystery shoppers felt their enquiry had not been answered or the quality of the experience did not meet expectations a low rating was given
- Some staff refused to continue with a query unless contact information was given (CRM information) although the enquiry was indeed a general enquiry. Some shoppers felt that it was a quick and easy way for the staff member to end the call
- Mystery Shoppers in some cases felt they were given a basic answer and that staff may not have acted in a proactive way. They point out that some customers may not be as determined or have the skills to get information and may lose out
- There was also evidence of more information or briefing to be given to the Contact Centre regarding events and incentives that different departments are leading on. This was particularly evident in queries associated with the Neighbourhood Life Magazine.

6.8. Best Practice research

- 6.8.1. A member of the team undertook good practice research. Including, within the sector Liverpool Housing Trust that are shortly to receive an award for their contact centre, and reading of the National Housing Federation's *Contact Centre in Social Housing – Delivering Excellence* Report. In the public sector Local Authority centres were looked at.
- 6.8.2. In the commercial sector, our Team Member considered Customer Access Centres at John Lewis and Marks and Spencer.
- 6.8.3. A theme that arose was that if the organisation is working well, the contact centre tends to. Also that successful contact centres have a great regard for the induction and training of staff

7. Conclusions and themes

7.1. General

- 7.1.1. We thank the staff involved for their insight and openness. And for the time they dedicated.
- 7.1.2. Our overall analysis at the conclusion of the Scrutiny is that it would have been timed when new arrangements currently coming into place are established. Although we can return to this area as a scrutiny in the future.
- 7.1.3. Customer access is affected by the overall effectiveness of the organisation. With the Customer Contact Centre being the first point of contact it is important that service effectiveness is addressed so that the Contact Centre can run at its full potential.
- 7.1.4. Overall, we concluded that the timing of our Scrutiny may not have been ideal given the changes being implemented with Customer Access, particularly with regard to the introduction of the new Customer Relationship Management system.

7.2. Briefing and interviews with Director, Managers and operational staff

- 7.2.1. We were concerned that there is not a Customer Access Strategy or Policy, but were assured that this is being developed.
- 7.2.2. The change in senior management responsibility for the Contact Centre, giving it greater focus, is welcomed.
- 7.2.3. Although staffing levels are being addressed, we consider that better planning needs to take place to identify how to meet the needs of *all* customers using the Contact Centre. We consider that if the organisation, particularly Repairs and Neighbourhood Management, were better at problem solving, the pressure on the Contact Centre generated by follow up calls would lead to better service from the Centre.
- 7.2.4. The apparent doubt as to whether the Contact Centre is presently 'fit for future' is a concern. We are pleased that this is being addressed.

7.2.5. In particular, we would like to see call volumes well monitored, particularly at peak times, to ensure that staff are best used to cover both caller's needs and that of other work (e.g. administrative).

7.2.6. There is a need for a proper training programme, based on an assessment of call centre staff skills and knowledge as compared to those required and that the most appropriate staff members deal with calls they are best able to handle.

7.2.7. It would be helpful if the telephone messaging wording offered callers a wider range of other ways of accessing services, including the website.

7.3. Resident Satisfaction Survey

7.3.1. The survey highlighted the importance of the wider organisation having an impact on the service of the Contact Centre. It would seem that resident responses reinforce our conclusions above.

7.4. Review of documents

7.4.1. The Scrutiny Panel were reassured by the contents of a number of the documents reviewed, particularly *Culture Club* guide and *Our Promise to You*. We are looking forward to the publications of the new Tenants' Handbook. However, the Scrutiny Panel we would like to be assured that staff actually carry out the application of the literature and the organisation monitor this.

7.5. Discussion with Communications Officer regarding the Communications Strategy, website, refreshed website and use of social media

7.5.1. We recognise that technology is the way forward. Development of the website and use of social media will increase customer access.

7.6. Interview with Sheltered Housing Scheme Managers

7.6.1. We are supportive of the improvements suggested by the Scheme Managers regarding better access by telephone (including a Freephone) and Contact Centre staff being aware that a vulnerable resident is calling.)

7.7. Meeting with the Resident Quality Inspectors

7.7.1. The Inspection has been useful in providing further context to our Scrutiny and the reaching of our conclusions.

7.8. Considered the report of the Mystery Shoppers

7.8.1. We were unpleasantly surprised to read of 85% of calls not being answered within the service standard time. The lack of an agreed greeting is also unsatisfactory.

7.8.2. It was disturbing to note that none of the callers were asked a data protection question. It will not have been necessary in all calls, but some may well have been.

7.9. **Best Practice Research**

- 7.9.1. We found this to be highly informative. In particular, the importance of a well performing organisation was noted, enabling an Access Centre to work well, enforcing the point we made earlier in this report.
- 7.9.2. We commend the National Housing Federation's Report: *Contact Centre in Social Housing – Delivering Excellence* to Network Stadium.

8. **Reflection on the arrangements for conduct of the scrutiny**

- 8.1. We thought that the scope of the Scrutiny could have been more specific. In this Scrutiny we have ranged from the strategic to very operational. Also the clear scope of what is meant by *Customer Access*.
- 8.2. As mentioned in the section concerning *Scrutiny Care*, we consider that the arrangements for the programme have worked well.

9. **Recommendations**

We recommend that:

- 9.1. In order to address the issues with organisational performance impacting on the effectiveness of the Contact Centre, annually managers go *back to the floor* and work in the Contact Centre a minimum of a day
- 9.2. 'Super User' Agents be introduced in the Contact Centre
- 9.3. Vacancies be recruited to as soon as possible (avoiding where at all possible use of agency staff) and leave and secondment requests by staff be handled such as to ensure a balance between effectiveness of the Contact Centre and good staff relations
- 9.4. Managers ensure that call centre staff are given clear priorities and guidance regarding call handling with the aim of achieving the resolution of enquiries as often as possible at the first call and that working practices are regularly reviewed to maximise the effectiveness of the service. This to include an understanding of the role of the Contact Centre by staff in the wider organisation.
- 9.5. A duty rota of specialist staff in the organisation be implemented and enforced to support Contact Centre Agents
- 9.6. The wording of the telephone messaging that callers hear be changed to offer a wider range of accessing services, including the website and a list of *frequently asked questions* be prepared for Centre staff to ensure consistency of advice
- 9.7. Effective monitoring of calls be made to ensure the needs of caller's and demands of other work, such as administrative, are met
- 9.8. A competency audit of call centre staff be undertaken that is used as the basis of a training programme and routing of calls to staff most able to handle the enquiry

- 9.9. Provision of a Freephone that kicks in after, say, three minutes be investigated
- 9.10. The effectiveness of the website be tested by Mystery Shopping from time to time
- 9.11. Contact Centre staff be aware of vulnerable residents calling and that barriers to access that might be preventing residents from using the service be investigated and resolved

For the Scrutiny arrangements going forward

- 9.12. That *The Hub*, when considering commissioning of Scrutiny in the future, consider the appropriateness of timing and define clear scope.

10. Service Improvement Plan

- 10.1. To address recommendations presented by the Scrutiny Panel attached (Appendix 1) is the accompanying service improvement plan, identifying the actions required, the accountable staff members and target completion dates.