Customer Contact Scrutiny Review

Purpose of the Report

1.   To update and seek the views of the Housing, Environment and Healthy Communities OSC on the outcome and recommendations from the recently completed customer contact scrutiny review.

Background

2.   A scrutiny review is a tool used widely across the social housing sector to give tenants the opportunity and power to hold their landlord to account for decisions and performance. It is also a mechanism for building in influence to decision making and provides an opportunity for a reality check on service delivery.

3.   This report is the conclusion of a scrutiny review commissioned by the Resident Influence Panel in September last year and carried out by a group of tenant and leaseholder volunteers with support from the Customer Involvement team.

4.   The reasons for the review are set out in page 1 of the accompanying report, along with methodology, results, and recommendations. The report will be co-presented by two of the volunteers who carried out the review with support from Helen Watson from the Customer Involvement team

Next Steps

5.   The results and recommendations of this report should be viewed alongside the feedback and insight from the Tenant Satisfaction Survey and supports the case for re-designing our approach to dealing with customer contact. A separate report on the results of the Tenant Satisfaction Survey and next steps will be presented at this meeting.

Recommendations

6.   The Housing, Environment and Healthy Communities OSC is asked to provide comment on the report and recommendations.

Contact: Martin Poulter martinpoulter@gateshead.gov.uk ext5380.

Scrutiny Review of Customer Contact

1. **Introduction**

There has been a build-up of evidence over a long period of time from tenants and leaseholders that customers receive an inconsistent and sometimes poor customer contact experience. This includes insight from tenant satisfaction surveys, and complaints.

The Tenant Satisfaction Survey 2021 told us that only 52% of tenants were satisfied that Gateshead Council as a landlord is easy to deal with. This has reduced to 44% in the survey conducted in November 2022.

A customer focus group met in 2022 to discuss the development of a consistent set of contact service standards. They identified what was important to them as customers when they contact Housing services and how they want that contact to be handled (see Appendix 1)

In response to this build-up of evidence, the Resident Influence Panel (RIP) commissioned a scrutiny review of customer contact in September 2022. The aim of the scrutiny review was to test and evaluate the customer experience when contacting different housing services using a range of methods including telephone, email, webform, text and Facebook Messenger. The review involved gathering evidence and then making recommendations.

It was agreed that on this occasion the Repairs and Maintenance service wouldn't be included in this review as they have recently undergone an in-depth review and are currently implementing a service improvement plan.

This review was carried out between June 2022 and December 2023 by Fadi Ekhdair, David Chambers, Flo Wood, Pauline Bedford, Ian McKenzie, Neil Atkinson and Alan Guest.

Officer support was provided by Simon Hand and Lisa Stewart from the Involvement team.

2. **Methodology**

Contact Standards Focus Group

The group reviewed the set of proposed contact service standards drafted by the focus group in 2022.

Mystery Shopping

A series of customer questions and scenarios were drafted to test the customer experience. The group discussed and agreed what they wanted to assess when making contact. Scenarios were general queries that each service may receive. The exercise was also designed to test the draft services standards reflected reality.

The group then carried out the mystery shopping exercise testing different contact channels over a number of weeks recording the responses.

Employee Focus Group

The final activity was to hold a focus group with employees from the Rent and Income, Neighbourhood Services, Older Persons, Multi-Storey, Neighbourhood Relations and Lettings teams. The purpose of this focus group was to understand from an employee perspective how they felt customer contact was delivered and suggestions for improvement. These service areas were chosen as their contact details are listed on our website and had also been subject to the mystery shopping exercise.

3. Summary of Findings

Mystery Shopping

Webform (making contact via the Housing webpage)
- Customers advised that the webform was generally easy to locate on the website and to complete.
- Some contact via this form received an automated response, but not all. Customers also noted the wording on the auto responses differed depending on the team you contacted.
- Two queries remained unanswered: Anti-Social Behaviour and Lettings.

- Those contacts answered included the employee's name, email signature and contact details, which was seen as a positive.

- Although initial response times were good (same day – 3 days), if a further question was asked the response time was slower, (one recorded as 14 days).

Text: Neighbourhood Housing
- It was initially fed back that it was difficult to locate the text number on the website. Details had to be supplied by employees supporting the group.
- When an enquiry was sent through, an immediate response was recorded advising error.
- A second attempt was made, asking when rent counters will be re-opening in the Civic Centre. No error message came through, but no answer came through either.
- Customers felt more use could be made of the text facility. At present there is only a number listed under Neighbourhood Housing Teams contact details. Text should be available for all services.

Phone:
- Some customers found it straight forward to locate on the website the phone numbers required for the team they were attempting to contact. However some customers who were not familiar with the website noted numbers for the Multi-Storey and Lettings teams were not easy to find. Not consistent how numbers are published on the website
- Answering time for calls ranged from 30 seconds to 3 minutes 38 seconds.
- For each call answered, employees all stated Good Morning / Afternoon and introduced themselves appropriately.
- Comfort message playing whilst on hold.
- On one occasion a call to the Multi Storey was directed to a voicemail. No follow up response was received by the customer.
- Mystery shoppers advised that for those calls answered, the customer service offered was good and that they felt listened to.

Email:
- Customers advised that they found all required email addresses on the website quite easily.
- Sometimes - Of the automated responses received, customers noted inconsistencies with the wording being different for each team.
- An enquiry sent to the email **homechoice@gateshead.gov.uk**, received no response. When this was followed by another e-mail, a response was received with an apology that stated the Lettings Team had received the enquiry but had not had time to respond yet.
- All those that received a response to their initial enquiry felt they offered a good level of customer service and that the tone of the emails was good.

Facebook Messenger
- Of the four questions asked, three received a response.
- Of the enquiries responded to, one was received the same day, the others the next day.
- Customers advised that all enquiries responded to answered their queries in full.
- Customers felt that there should be more information on the website to advise you can contact us via social media platforms.

4. Employee Focus Group

Customers wanted to hear from employees first hand as to how customer contact was handled from those dealing with queries on a daily basis. They also wanted to hear employee's feedback as to how customer service could be improved.

Can you give an overview of how (and who) deals with customer contact in your team?

- Lettings – One employee answers incoming phone calls, with the option to leave a voicemail message after five minutes. Voicemails are picked up by another employee who then filters queries to relevant section within the team.
- Rent – There are three dedicated teams set up to answer queries including Advice & Support, New Tenancy and Secure Tenancy teams. There is also an option to leave a voicemail. Mixture of office based and home workers are in the incoming call loop.
- Multi-Storey – Dedicated admin officer deals with range of tasks including answering calls and emails.
- Older Persons – Dedicated admin officer answers calls which are then filtered out to the relevant mobile/sheltered officer.
- Neighbourhood Service - Dedicated employees answering calls and emails.

Observation:
- Teams appear to have arrangements in place to answer customer queries, but there are inconsistencies in approaches.

When a customer contacts you do you record that contact anywhere?
- Some teams use NEC (Northgate) to log customer contact, although not all contact is logged.
- Lettings have a time limit to log contact information between each call, once the time limit is reached, they need to move onto the next call. Resulting in not all information recorded from calls.

- Employees seemed confused as to the correct approach to contact logging on NEC, i.e. who logs this, the person taking the enquiry or the person who the enquiry is forwarded to?

Observation
- Not everyone uses NEC all the time and if a query comes through it can take a while to login and bring up relevant information on NEC.
- Rent and NRT teams use a different section in NEC to log customer contact. This creates a barrier as not all employees have access to this.
- Confusion about whose responsibility it is to log enquiries.
- The Council's Customer Services team use their own system which can't be viewed by Housing teams.
- Different ways of logging customer contact reported, as information is stored in different places, not everyone knew how to add or read notes.
- Not aways long enough between calls to log contacts.

If you can't answer the query yourself, where would you seek advice from, or where can you look to find the information required?
- Managers and supervisors provide support and advice
- Other team members with more knowledge and skills can help.
- Contact others in different teams for help (if they are available).
- Customers can mention several issues at one time which would need dealing with via different services.

Observations
- When trying to establish contact information for colleagues the internal telephone directory is not user friendly, causing delays trying to find contact details for employee or team required.
- Staff turnover can impact on knowing who to go to.
- Difficult finding email addresses for teams via Microsoft Outlook. Can be difficult to search for team email addresses using the search facility on Outlook.
- Not all employees have contact numbers listed or phones aren't switched on.
.
Are you aware of any service standards that apply to customer contact in your service such as a corporate greeting or a target time to answer the phone?
- NRT have strict targets in place due to the nature of support they offer e.g., Hate crime and domestic violence.
- Multi-Storey team ensure cover is in place to cover absence, so queries are still picked up.
- Neighbourhood Services employees advised a corporate greeting is in place when answering phone calls.
- Rent Team Leaders monitor incoming calls to ensure there is sufficient cover so any adjustments can be made.

Observation
- There are no consistent service standards for customer contact.
- Neighbourhood Services and Rent Teams are able to monitor call statistics and see how many calls are coming in at one time. Can all teams do this?
- No standard for automated messages for emails or webform enquiry. Some teams have them set up, however they don't always state how long to expect a response by or details of who to contact in an emergency e.g. NRT

If a customer contacted you, whose first language is not English how would you deal with that? What guidance have you received/is available on how to deal with such a situation?

- Difference in knowledge of where to find this information.
- Employees advised that there used to be training on this subject, but it hasn't been carried out for a while.

Observation

- Customers expressed concern. All employees, particularly in customer facing roles, should be able to access translation services.

When sending a response to customers, would you add your own contact details onto this – or would you place your team's email address and phone number?

- Different approaches adopted for different teams, some would add both, others would only add their own.

Observation

- For those only adding their own contact details, what happens if a customer emails or phones if they are away from office due to sickness or holiday, would this be picked up?

Do you ever receive enquires that are meant for other teams? If so, what are they most frequently about? How do you deal with them?

- Employees advised that calls come through to them for Repairs and Lettings when their lines are busy.
- In most cases they are unable to help customers who are already frustrated, and can only offer to email enquiry over. Also, unable to offer a timeframe for response.

Observation

- Customers already frustrated about not being able to access service required are trying to get through using different contact numbers. Employees are unable to offer real support.

If you have to pass a query on, how do you know if this is followed up and the customer is contacted with a response?

- Some employees will respond to let you know they have made contact, but not all.
- Before transferring queries over, some employees will give their contact information to customers, asking them to make contact again if they do not receive an answer from forwarded team.

Observation

- How many queries are passed on and not responded to if not recorded at first point of contact?
- How many employees know that you can update NEC once you have handled a referred query *or* know how to do this?

Do you ever encounter any specific difficulties when dealing with a customer contact?

- Employees often receive calls from customers regarding repairs related queries. They are often frustrated about not being able to make contact or gain answers

from issues they are experiencing. They often vent their frustrations on employees who are unable to answer their queries.
- The internal telephone directory is not kept updated, there is a lack of knowledge of email addresses for teams within the Council, no set timeframe for responses to customers, no access to notes via NEC for certain teams (Lettings, Rent, Council Customer Services).

In your current role what would make things easier for you when dealing with customer contact?
- More user-friendly internal telephone directory.
- Being able to view notes from all teams on NEC.
- System/dashboard in place to provide an overview of contact on NEC Housing.
- More understanding about other teams and what they do e.g., invite to Wednesday training sessions (Neighbourhood Services).
- Training to explain procedures for new staff before they start in their roles.
- Internal contact number for repairs to pass on customer queries, especially in emergency situations.
- Improved signal for mobile telephones – hot desks / ground floor office.
- Automated messages to provide timeframes to manage the customer's expectation (email / webform).

Observation
- Employees appear to be trying their best to offer a good level of customer service but are being hindered by an inconsistent use of IT systems.

Again, in your current role, what training/support have you received to help you deal with difficult situations? e.g an aggressive customer.

- Training available via learning hub – (Conflict Management), but this is more online based.
- Supervisors provide support and advice when dealing with difficult situations.
- Safety always considered when visiting customers' properties. NEC will flag up customers not to visit alone.

Observation
- Training approach does not appear consistent and mainly seems to be carried out online, not always best approach. This also puts more pressure on employees to get the course done as quickly as possible to fit around their day jobs.
- No focussed Customer Service training appears to be in place.

Thinking about everything that has been discussed today do you personally think Gateshead Council offers a good level of customer service?

- Yes, by providing a wide range of services and dealing with many different enquiries. We provide a service by going above and beyond our roles. Many frustrations come from barriers and restrictions which prevent us from not delivering/responding as quickly as we would like.

Observation: Customers felt reassured that employees want to deliver excellent customer service, but other factors such as the barriers noted above are hindering delivery of a better service.
Additional Comments

- Many experienced employees are leaving the business taking a wealth of knowledge with them
- Recruitment – Employees feel this process takes too long and puts increased pressure on understaffed teams.
- Repairs and Letting Teams – Customers are becoming increasingly frustrated when attempting to contact these busy departments, often trying other avenues to get through, adding to pressures on other services.

5. Summary of Findings

Following the mystery shopping exercise and discussions with employees, it has been found that officers try their best to offer a high level of customer service at all times, however, this can often be hindered by technology and lack of appropriate training opportunities.
Customers concluded:
- Service Standards – There are no consistent set of service standards in place when dealing with customers and the approach is different for each team. This results in a very inconsistent customer experience.

- NEC – Not all employees know how or the correct way to use NEC including logging contact. Contact is being recorded by some, but not all employees/teams, plus notes were being recorded in different locations within the database that not everyone knew how or had access to. These inconsistencies need addressing.

- Training – There does not appear to have been any carried out for a long time on NEC, it is largely carried out by colleagues or self-taught. Very little customer service training appears to be carried out and where it is i.e., dealing with difficult situations it is delivered online which is not the best approach for all.

6. Recommendations

The following are a list of recommendations based on the findings:
- Take steps to develop and deliver a more consistent customer contact experience. A co-design approach in the development of this should be adopted with employees and customers working together.

- Develop and introduce a single customer service team that will manage all Housing related contacts across different contact channels.

- Implement a clear set of service standards that will help support the delivery of a consistent service that reflects customers' requirements.

- Review and deliver customer service training for all employees who deal directly with customers, with refresher training being built into the programme.

- Provide appropriate training on how to use NEC, including the CRM element and contact logging.

- Provide training in mental health awareness.

- More targeted work in our communities to enable customers to speak with Council employees more freely.

- Provide refresher training to employees on how to access translation services for customers who require this. This should be mandatory for all new starters.

- Review with customers their preferred methods of contact and ensure we offer a range of contact channels including text, WhatsApp, Facebook Messenger, Twitter and Live Chat.

- Carry out a project to encourage customers to advise of their profile information and preferred method of contact. This will enable a more tailored approach.

Appendix 1

Customer Contact Service Standards Focus Group

To ensure that standards were co-designed from the outset we asked a group of tenants to share their views in an informal one-off focus group about what matters to them when they contact us.

Nine tenants along with six officers took part in the focus group. The officers represented the Repairs Reporting, Neighbourhood Services and Rent and Income Teams. Officers were invited as part of the co-design principal and asked to join the discussion, listen to what the tenants were saying and think about what they would need in their roles to be able to deliver the customer's requirements.

The attendees were split into three small groups of tenants and officers and asked to talk about what forms a good experience for them when they contact an organisation by the following methods:
- Telephone
- Email
- Face to Face
- Letter

Considering the customer journey of each contact method in turn, the groups were asked to write down their important elements (either as a group consensus or individually) on post-it notes and stick them to the wall under the corresponding headings. This avoided any expectation on attendees to feed back their findings to the wider group and helped to keep the event informal and relaxed.

From this exercise the group came together and drafted a set of service standards. Further discussion and agreement are required on timescales stated in each service standard.

Draft Service Standards

Key principles:
- We aim to provide a consistently good customer experience across all contact channels defined by customers.
- We will clearly define and promote the service offer for each contact channel
- We will set organisation – wide culture standards & methods for customer interaction which eliminates no/low value activity from the customer viewpoint
- We will consider how digital methods can reduce avoidable contacts rather than how IT can just streamline existing processes
- Going forward individual Services must seek approval to make any changes to ensure they align with these principles

General Standards
We will:
- Introduce ourselves by name and provide proof of identity when entering your home
- Provide you with a positive customer experience
- Be friendly, helpful and welcoming
- Be realistic and not make promises to you that we cannot keep
- Be patient and ask relevant questions to establish facts

- Demonstrate empathy, compassion and professionalism
- Maintain the confidentiality of all information you give us and not disclose it to others without your permission unless required to do so by law
- Treat you fairly and according to your needs whatever your age, nationality, ethnic origin, disability, gender or sexual orientation
- Provide a translator, signer, or information in other formats such as audio, large print, Braille etc. if required
- Provide you with personal information that we hold about you if you request it
- Use written and spoken language that is clear, jargon free and easy to understand
- Offer you a home visit if you are unable to come to our offices
- Contact you if we are unable to keep an appointment as soon as we can to re-arrange it
- Use performance data and customer feedback to continuously improve the customer experience

1. **When you telephone us, we will…**
   - Answer your call within X seconds
   - Greet you with Good morning / Good afternoon
   - Inform you that you have reached Gateshead Council and identify the Service
   - Tell you the name of the person you are speaking to
   - Use security questions to confirm who you are and protect your identity
   - Know who you are and why you have contacted us previously if you have done business with us in the past
   - Actively listen to you to ensure we understand your enquiry
   - Make sure we either deal with your request or put you through to the most appropriate person, providing you with their name and contact number
   - Answer your questions immediately, or if this is not possible, call you back at a convenient time with a response
   - Phone you back using our line if you would prefer and if it is appropriate
   - Ask if there is anything else we can help you with before ending the call
   - Inform you about any other service that needs to talk to you and offer to transfer you
   - Provide an answer phone service where appropriate, and get back to you within 1 working day
   - Use comfort messaging to provide you with up-to-date information about out of hours services and call waiting times

2. **When you visit us, we will…**
   - Deal with your enquiry at enquiry counters within X minutes
   - Ensure all offices are easily accessible
   - Provide rooms where you can discuss things with us in private
   - Provide information about our services that is clearly visible and up to date
   - Provide adequate seating for customers, and toys for children
   - Provide a free-phone telephone so that you can contact services within Gateshead Council.

3. **When you send us an email, we will…**
   - Acknowledge your email X working days, providing a full response if possible
   - Provide a full response within X working days
   - Make sure our responses are clear and easy to understand
   - Use security questions to confirm who you are and protect your identity

- Copy you in if we have to forward your email to someone else
- Provide an instant automated response to your emails

4. When you write to us, we will…
- Acknowledge your letter within X working days
- Reply to your email or letter within X working days
- Make sure our responses are clear and easy to understand
- Give you the contact details of the person dealing with your query

5. When we meet with you, we will…
- Arrange a mutually convenient appointment
- Make sure you know you can bring someone to an interview to support you
- Meet with you on time if you have made an appointment
- Offer you an appointment for a same sex interview if you require it
- Leave a calling card with a clear name and contact number if you are not in
- Speak to you in private if you wish

What we ask in return
- Treat us with respect
- Be considerate and polite to other customers
- Keep up to date with your rent payments
- Be on time for appointments
- Supply us with more information if we ask you to

You can also help us by:
- Giving us the information, we need to help you
- Letting us know if you have any individual requirements
- Telling us how we can improve our service
- Asking us to explain anything you're not sure about

What you can expect as an employee

- A clear set of customer service standards

- The training you need to deal with customer contact including:
    - Customer Service
    - Systems Training
    - Dealing with difficult situations

- Easy access to up-to-date knowledge

- The right software and hardware to enable you to do your job effectively.
- Systems that allow me to get 'one view of the customer' that enables me to give professional effective customer service.

- Support from all housing colleagues who ensure info around all customer interactions and other relevant updates are entered onto our systems in a timely fashion, creating a joined-up customer experience.

- Support from management to protect your wellbeing, prevent feelings of isolation and combat empathy fatigue.

- A zero-tolerance approach to abusive customers.

- Commitment from all services that they will always be available and will take responsibility for customer contacts being transferred to them.

- A performance management culture which looks to make Gateshead Council 'easy to do business with'.

- The data you record through contact logging will be continuously reviewed and used to reduce avoidable contact and improve CRM.