

**Plus Dane Housing’s Scrutiny Panel**

**How effective the customer communication journey is during the repairs process**

**March 2018**

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**1.Background to Plus Dane Housing’s Scrutiny Panel**

This is the second review carried out by Plus Dane’s Scrutiny Panel.The Panel has a membership of 10 tenants who bring with them a diversity of backgrounds, skills and experience.

Although the Panel is made up of tenants it is first and foremost a business monitoring and improvement tool. The Panel focuses on issues from a whole business perspective rather than just one group of stakeholders.

The scrutiny approach at Plus Dane ensures that the relevant staff teams work closely with the Panel throughout reviews. This involves; briefing the Panel about the service area, highlighting concerns and developing possible solutions and recommendations. In this way, we hope to have good quality technical input and advice from staff throughout the process which will help the Panel produce practical solutions, taking into account staff thinking, advice and recommendations for improvement.

The final report, which includes the Panel’s recommendations and Director’s action plan is presented to Board for sign-off and monitored by the relevant delegated committee.

**2. Introduction to the review**

The scope of the scrutiny is to review how effective the customer communication journey is during the repairs process.

There is shared responsibility across a number of different teams for communicating with tenants and customers. The Communication Team falls under the Corporate Directorate and has overall responsibility for corporate communications. However, each service area has its own arrangements for communicating with tenants and customers using a variety of methods, bespoke to their own service area. This review has looked at the customer journey from reporting a repair to its completion and investigated how effective the communication is at key stages of the process. Whilst the focus of the review will be on the customer experience, we have also explored how Plus Dane can improve its processes and be more efficient. We are clear that the focus of the review has been to ensure that the direction of travel meets the needs and aspirations of tenants and customers.

We selected to review the repairs customer journey, as this is where the organisation is making one of its biggest communication investments both in customer impact and in communication volumes. The challenge has been to keep the evaluation focused so that we scrutinise the communication (not the service itself) evaluate it and suggest where improvements can be made.

Although we looked at how Plus Dane communicates with tenants around repairs it is envisaged that other service areas will be able to use the recommendations to help improve how they communicate with tenants. The Panel have reviewed repairs as a theme to show how effective communication is with tenants works but the recommendations are not limited to just the repairs service.

**We have carried out this review by;**

* Reviewing how Plus Dane communicate during the repair process.
* Looking at best practice elsewhere in the sector and beyond.
* Evaluating relevant data and insight.
* Ensuring that the direction of travel meets the needs and aspirations of tenants and customers.

**Those involved in repairs communication include:**

* Customer Access Team (CAT)
* Repairs Schedulers
* Repairs administration
* Asset Management
* Trades Teams
* Contractors
* Tenants
* Service Directors

**3. What we did**

**Desk top review**

We looked at the 69 complaints made through Voluntas in the last financial year.

We listened to 15 pre-recorded CAT calls and then made follow on phone calls to tenants to see whether tenants were satisfied with the process specifically around how Plus Dane had communicated with them.

We looked at performance documents including;

* Voluntas repairs satisfaction report 2017-17.
* Customer satisfaction survey - STAR survey- Kwest.
* Repairs satisfaction information per contractor 2015 to16 and 2016 to 17.
* Desktop review of customer insight in respect of the repairs service report.

**Face to face activities**

* We observed CAT and Schedulers calls on a Monday morning as they included out of hours follow up calls from the previous weekend. This included 33 CAT observations in Merseyside and Cheshire and 6 Scheduler observations in Merseyside. Subsequent follow on calls were made to some tenants to see whether or not Plus Dane had completed the jobs and how tenants felt Plus Dane had communicated with them during the process. We also used the opportunity of observing staff to discuss the decisions they made and actions taken.
* We held 4 workshops with Schedulers, CAT and the Trades Team in Merseyside and Cheshire. Staff were very honest and open about issues they had around communication and made suggestions about what could be done to improve the service.
* We looked at Plus Dane’s interactive platforms (including digital) to investigate ease of use and content, and more importantly to see if it was customer friendly and encouraged user interaction.
* We compared the Website to that of other organisations.
* We produced a questionnaire which was sent to CAT and Repairs Managers and Directors in order to compare their views to those of the staff focus groups.

**4. What we were told about how Plus Dane currently communicates with tenants around the repairs service**

A project group has recently been established (TED) to look at reviewing and improving Plus Dane’s wider IT systems. The repairs service is currently preparing for a full service review which will bring major changes to the service currently provided from April 2018. This will include looking at bringing all the repair’s service in house and not using contractors for day to day repairs. However, some specialist contractors will still be used e.g. roof specialists.

Last year Plus Dane carried out 38,500 responsive repairs which is an average of 3.1 per home plus an additional 10,000 gas breakdowns. Out of 12,500 homes, 11,000 tenants reported a repair.

There are currently a variety of channels that tenants use to report repairs, these are as follows:

* Phone call into the customer access team via 0800 1692988
* Through the Plus Dane Housing mobile app
* Email
* Face to face (reception)
* Social media (Facebook and Twitter)
* Website (via form)
* Web chat
* The most popular channel that tenants use to report a repair is via the 0800 phone line.

Repairs can be responsive day to day, emergency and out of hours and the repairs are completed by the in-house workforce (DLO) or by external contractors.

* CAT aim to arrange repairs appointments at the first point of contact but this isn’t always possible. For complex repairs that require prior inspection, repairs completed by some contractors, jobs requiring two to attend and for access to repairs diaries (where there is no availability showing) the Customer Access Team refer calls to the Schedulers, who make the appointments directly with tenants.
* Morning and afternoon appointments are provided to tenants and there is an out of hours’ service delivered by Orbis. Appointments are confirmed by text message so that tenants know when to expect the repair to be done. When jobs are sent to external contractors, the contractor is responsible for contacting tenants with details of appointments.
* Where jobs have to be rescheduled, the Schedulers are responsible for informing the tenant. If rescheduling occurs due to parts not being available, the responsibility lies with the Tradesperson to advise the schedulers prior to rescheduling and inform the tenant. If further or alternative trades are required, the Schedulers will organise and inform the tenant.
* Satisfaction gathering is outsourced to Voluntas who ring a sample of tenants (1082 per year) to seek their views about repairs. If dissatisfaction is expressed this is sent to Managers who contact the tenant directly.
* Current satisfaction for the repairs service is 88.9% (February 2018).

**5. In summary - What we found**

**What works well**

* The over-riding finding is that staff endeavour to deliver a good service **despite** poor systems. Although there were issues around time management, interaction of teams and information availability, it was clear that staff in general take a great deal of pride in their work.
* The Trades Team, CAT and Schedulers are all clearly committed to delivering a good service. They are often constrained by inadequate systems however, they will always try their best to work around problems and inefficiencies to give tenants the best service they can.
* There were examples of tenants being offered a service over and above what is expected of them including same day appointments when tenants had been let down by previous poor service.
* In general, the DLO appears to deliver a good service and has, in general a good reputation in the local community.
* Staff were generally very friendly and professional across the teams.
* On the whole tenants did not complain about long waiting times on the phone and generally accepted that staff do not always have information at hand.

**IT Systems**

* One of the more significant challenges for Plus Dane currently is IT infrastructure and data accuracy. We found that systems and processes have been established to make things easier for staff rather than being customer focused. However, this approach has not worked as the ever evolving systems are cumbersome and difficult for staff and tenants to utilise and navigate.
* Current IT systems are not fit for purpose. They are out of date, slow, too complex, poorly integrated and there are too many of them. There are limitations which make it difficult to communicate with tenants and for staff to communicate with each other. Systems are not linked and accessible to all staff who need specific information. This makes it difficult to resolve issues at first point of contact.
* Current communication platforms – CAT, phone, App, Website and Live chat do not appear to be integrated or compatible with each other.
* IT systems are currently supported by manual referencing which should be automated and integrated into IT systems. This includes coding for jobs and juggling appointments for Schedulers.
* There is a lack of audited information and documentation about individual properties including boiler type, planned works, clarity of the responsibilities of Plus Dane/ tenant for specific appliances.
* The system for recording communal repairs lacks clarity.
* The level of success is dependent on the depth of knowledge and experience of staff and their individual skills to navigate complex systems. This can lead to inconsistencies in service to tenants.
* Tenants are sometimes left on the hold for significant lengths of time as staff navigate around inefficient IT systems or try to phone other teams for appointments.

**Internal communication – between CAT, Trades Team and Schedulers**

* Trades Team/CAT do not always have access to Schedulers when they need it.
* CAT have to call Schedulers to make appointments and don’t always get through - tenant then has to be called back to be given appointment details.
* CAT are not always confident that jobs are being completed when passed to other teams. Tenants will then call back adding to queues.
* There appears to be ‘Silo’ working between teams, sometimes creating a lack of understanding of each other’s roles.
* CAT sometimes passing calls to Schedulers when other members of the CAT team could be asked for advice.
* With regard to teams and team members, it was felt that there were issues around clarity and uncommunicated/inaccurate expectations about each other’s roles, leading at times to criticism of each other’s expertise.
* Workforce attending multiple times to one job or sending the wrong trade to a job numerous times.
* Lack of advanced accurate information. Schedulers/CAT not arranging for the correct operative to attend which can lead to not being able to complete work because they do not have the correct tools.
* Staff appear to be overloaded – specifically Schedulers and some trades such as plumbers.
* Compliments aren’t always fed back to staff but negative comments are.
* CAT are expected to have high level of knowledge and expertise in too many service areas which can lead to poor diagnosis.
* Tenants will say they are happy with the repairs service because they are happy with the quality of the repair/attitude of staff and relieved that the process is over. If questioned about the repair journey tenants may well be less than happy.

**Contractors**

* Contractors and Plus Dane do not have access to each other’s data systems which can lead to poor communication with tenants e.g. tenants waiting while phone calls are made to contractors.
* Tenants are sometimes encouraged to contact contractors directly.
* There appears to be no agreed standard of service around communication for contractors/sub-contractors which leads to a two-tier level of service for tenants.
* General standard of work and communication with tenants is not consistent.
* Sub-contractors not completing repairs and not communicating with tenants leading to increased calls to CAT.

**External Communication – between CAT/Trades Team, Schedulers and tenants**

* Tenant does not always have diagnostic expertise which can lead to incorrect coding.
* Tenants are not able to track jobs consistently and not always being informed about cancelled, rescheduled or changed appointments.
* Poor communication with tenants when an enquiry is passed to the Asset Team. CAT will make a commitment that a member of staff will contact the tenant and this does not always happen.
* Insufficient contact with tenant following an inspection of a property
* Out of the 69 complaints received about repairs and communication 60 were made by phone the main issues were;
* Staff not keeping appointments
* Staff not getting back to tenants or not being notified of appointments via text/email as agreed
* Tenants not being advised of rescheduled/changed or cancelled appointments
* Staff not getting back to tenant when they have agreed to or not advising when Trades Team will be attending, resulting in tenants needlessly contacting CAT.
* No access cards left at properties/texts do not provide enough information about the specific job and purpose of the call.
* Some tenants have poor expectations and a lack of confidence that Plus Dane will do what they have agreed e.g. ring back.
* Confusion for tenants about who is doing what job when both contractors and Plus Dane are involved or it is a complex job.
* There appears to be no service standard in place. There is insufficient information about what the repair service offer is to tenants. No common guidelines, tenant’s manual/booklet etc. for tenant or CAT to refer to when discussing or diagnosing issues around repairs.
* Lengthy, time-consuming and inconsistent tenant identity checks and lack of customer service standards.
* Tenants aren’t updated about the progress of their repair, so are needlessly making repeat phone calls.
* CAT time spent chasing jobs that have not been done/failed appointments etc.
* Trades Team find that areas where they are working in have not been cleared or prepared prior to arrival.
* There is sometimes too much customer effort required throughout the process including anecdotal comments from tenants not able to get through on the phone or being put on hold for long periods.

**General Communication**

* Branding is not consistent.
* The website offers a poor service for tenants to report repairs. It has little information and is outdated and difficult to navigate.
* Tenant satisfaction surveys do not always ask the correct/specific questions to provide useful information to Plus Dane to identify areas for improvement.
* Processes for keeping tenants informed of actions following survey comments are not coordinated or monitored and responsibility for feeding back to tenants is unclear.
* Tenants who do not regularly report repairs/communicate with Plus Dane tend to go under the radar which could leave them vulnerable when they need support.

**6. Recommendations – please see table below**

| **Recommendations** | **Short term**  | **Longterm** | **Evidence**  | **Directors Response** | **Agreed Action** | **Who?****When?** |
| --- | --- | --- | --- | --- | --- | --- |
|  |  | **1.IT Systems***One of the more significant challenges for Plus Dane currently is IT infrastructure and data accuracy.* |  |  |
| 1.1 Investigate updating and streamlining IT systems so they are more customer centered, fit for purpose, simplified and integrated. While TED has been established to achieve this in the next 18 months, there needs to be consideration for improving systems in the interim. This should also include looking at;* holding information in one place
* property condition and history being recorded
* planned works being recorded
* accessibility for everyone who requires it including CAT/Trades Team, Schedulers
 |  |  | 1,2,3,4,5,6 |  |  |  |
| 1.2 Look to implement smarter standard procedures for confirming/updating tenant contact details and property condition by utlising all contact points including home visits, annual gas checks etc. This may include photographs of jobs. |  |  | 2,3,6 |  |  |  |
| 1.3 Explore alternative ways of informing tenants about appointments other than texts. Texts need to be more specific not only including the trade but the actual job that is being done and by who and that this is sent out in a timely manner. |  |  | 2,3,6 |  |  |  |
| 1.4 Review how vulnerable tenants are informed about repairs in line with Plus Dane’s Safeguarding Policy with a view to eliminating inconsistencies across all platforms. |  |  | 2,3 |  |  |  |
| 1.5 Look at developing an on-line tenant’s manual that can beeasily updatable, low cost and easily accessible. A smart version could be account or property specific, based around property inventory and tenancy agreement. |  |  | 3 |  |  |  |
|  |  | **2. Internal communications***Looking at the relationship between CAT, Schedulers and the Trades Team* |  |  |
| 2.1 Review staff structure with particular focus on the balance of roles and the numbers of schedulers and specific trades.  |  |  | 2,3 |  |  |  |
| 2.2 Review how the CAT Team, Schedulers and Trades Team integrate with each other and look to improve ways of working together.Look to capitalise on the wealth of knowledge that exists in the various teams by developing mechanisms to encourage more collaboration and sharing of expertise. Consider shadowing/training so there is a better understanding of each other’s roles. |  |  | 2,3 |  |  |  |
| 2.3 Identify staff training around communication and continuity of service, information flow and information sharing as well as specific trades skills. Utilise the Trades Team to help CAT develop diagnostic tools.  |  |  | 2,3,4 |  |  |  |
| 2.4 Look at improving collation and distribution of information and how accessible it is for staff. There is sufficient internal knowledge but teams are unaware of exactly what information is needed to make their job easier. Information should be in the right place and shared effectively. |  |  | 2,3,6 |  |  |  |
| 2.5 Although CAT staff have a broad knowledge there is a case for individual team members to take ownership of, or develop, specific areas of expertise as a support resource for all CAT staff and Schedulers. |  |  | 3, |  |  |  |
| 2.6 Provide clarification and information for CAT and tenants about;* What repairs Plus Dane are responsible or e.g. appliances.
* When and what planned works are scheduled.
 |  |  | 1,2,3,6 |  |  |  |
|  |  | **3. Contractors** |  |  |
| 3.1 Look to integrate information and systems with contractors so that they have sufficient property and job information. Although Plus Dane are moving towards replacing contractors and increasing the volume of work for DLO there will be some specialisms where external contractors will still be required e.g. roof repairs, adaptations etc.  |  |  | 2,3 |  |  |  |
| 3.2 Ensure contractors follow agreed standards and protocols so there is consistency with both the DLO and across the organisation. |  |  | 2,3 |  |  |  |
|  |  | **4. External Communications***Communications between CAT, Trades Team, Schedulers and tenants* |  |  |
| 4.1. Reassess how tenants can be kept better informed about each step in the repairs process – this also includes assets and inspections.Look at ways in which tenants can track jobs. |  |  | 1,2,3 |  |  |  |
| 4.2 Review the diagnostic tool for tenants to use when reporting repairs to ensure constancy across all platforms with tablets, website, phones, Apps etc. |  |  | 2,3,4,5 |  |  |  |
| 4.3 Look to develop a service standard to include a call back guarantee for tenants. This should include ways to keep tenants informed in an agreed and timely manner when appointments are changed, cancelled or amended to stop avoidable contacts and repeat calls.Investigate the number of repeat and follow on calls for tenants who have not had works completed. |  |  | 1,2,3,6 |  |  |  |
| 4.4 Review no access cards and all repairs related documents/texts/letters to ensure they provide precise information regarding the exact repair referred to including dates, team/trade, telephone numbers and name of person delivering the information and texts so they provide more precise information about exact repairs and dates. |  |  | 1,2,3,4,6 |  |  |  |
| 4.5 Look at how Plus Dane manage tenant expectations around what the organisation can and can’t do including when a repair cannot be completed in one visit. |  |  | 1,2,3,5,6 |  |  |  |
| 4.6 Ensure all compliments from tenants are fed back to staff. |  |  | 3 |  |  |  |
| 4.7 Look to simplify the time consuming tenant identity checks so there is a consistency in questions asked and the process is simpler and less intrusive but still secure enough for tenants and the organisation. |  |  | 1,2,3,4, |  |  |  |
| 4.8 Investigate the possibility of establishing a pre-works checklist for CAT to use to inform/remind tenants to make areas accessible prior to Trades Team attending. Also to remind tenants that the Trades Team need to work in a smoke free environment. |  |  | 3 |  |  |  |
|  |  | **5. General Communication** |  |  |
| 5.1 Look to ensure Plus Dane take every opportunity to develop trust and build brand loyalty. Ensure consistent branding. NI logo to be removed across Plus Dane. To include;* Removing Trades Team NI branded clothes so that tenants know it is Plus Dane who are calling.
* All correspondence to tenants should include Plus Dane Housing logo and NI should be removed.
 |  |  | 1,3 |  |  |  |
| 5.2 Although the website is currently being reviewed short term remedial actions need to be considered to ensure; * Consistency of branding
* Clear information about Plus Dane and the tenant’s responsibilities
* Clear contact options for repairs including phone numbers for all circumstances not just emergencies
* Linkage between relevant site pages ‘Repairs & Maintenance’ and ‘Reporting Repairs’
* Standardising information across all platforms where possible.
 |  |  | 2,3,4 |  |  |  |
| 5.3 Ensure that information collected/actions by Voluntas are fed back to tenants in a more co-ordinated manner for accountability following actions being passed to Managers. |  |  | 1 |  |  |  |
| 5.4 Plus Dane need to look at how and what questions they ask when surveying tenants about service satisfaction so that poor performance can be better identified.  |  |  | 1,6 |  |  |  |
| 5.5 Look at how Plus Dane manages expectations for tenants who do not regularly contact Plus Dane. Look at ways to keep them informed about how to communicate with Plus Dane. |  |  | 2 |  |  |  |
| 5.6 Look to ensure landlord / tenant communications are sustained, and regularly updated, avoiding "communications gaps" throughout the tenancy, so that services such as repairs are fully supported as and when they are brought into play. This is essential to manage tenant’s expectations and to reduce misunderstanding, time-wasting & frustrations. |  |  | 2 |  |  |  |
| 5.7 Look to establish a common service standard across Plus Dane. Although there is a Communications Strategy, each team appears to develop their own interpretation. The brand culture needs to be reaffirmed and standardised. |  |  | 1,3 |  |  |  |

**Evidence**

1 = Desk top review

2 = Observations

3 = Workshops/focus groups

4 = Plus Danes interactive platforms

5 = Other organisations

6 = Survey to Managers

**7. In conclusion**

Both a Standard of Service protocol and an improved dynamic scheduling infrastructure are required to enhance the customer journey and specifically the customer's communications experience. This development process, built around good communications between customer, Trades Team, CAT and Schedulers should see both long term and short term wins resulting in improved performance, cost efficiencies, use of time and resources and improved customer relations.

We are aware that Plus Dane are already in the process of reviewing the repairs service and may have made progress already in some areas. We acknowledge that we are not necessarily the experts, however we would like to see prompt changes made and actions implemented rather than delayed because reviews are in progress.

As this scrutiny process evolved it became clear that our observations reflected those found in the Kwest Report of 2016. The Executive Summary states ......"the survey suggests that better and more communication, listening to tenants, quicker responses and being able to talk to the right person would improve the customer experience". It is important that Plus Dane Housing have a clear message, that it is consistent with the communication process and that the communication invites tenant interaction.

We feel that The communication process and specifically that of the repairs process needs to be unique to Plus Dane Housing, it must be informed, knowledgeable, understandable, empathetic and one that inspires trust.

**8. Next steps**

We hope that our scrutiny review has helped to inform how Plus Dane communicate with tenants around repairs can be improved to bring both business efficiencies and improve the tenant experience.

We would like to emphasise that although we looked at communications around the repairs service, many of the lessons learnt can be applied throughout Plus Dane.

We would like to thank all the tenants and staff who gave their time to feedback and speaking to us honestly and openly about their ideas for improvement.

As promised, we would like to send this report to all the staff who took part in the workshops and observations, providing us with information advice and guidance.

We would also like Board to recognise how committed staff are to delivering a first class service to tenants despite their frustrations with poor systems etc. Also, how enthusiastic they are for change and improvement in order to deliver an improved customer focussed service. We recommend that Plus Dane utilise the enthusiasm of staff in delivering change and improving services.

 We would now ask that the Board considers and approves both this report and the attached action plan.

The Service Director will provide quarterly updates on progress against the action plan to both the Neighbourhood Committee and ourselves.

We look forward to hearing your views on our findings and recommendations.