Cornwall Housing Resident Scrutiny Panel – Customer Services Report

November 2024

Tenant Led Scrutiny Panel

Executive summary

The Resident Scrutiny Panel looked at Customer Service, in particular the Contact Centre. This involved a desktop review, interviews with staff and resident and staff surveys.

The Panel found the Customer Service team do a great job in a challenging role, and that technology upgrades and improved inter-departmental communication would enhance efficiency and customer satisfaction.

Seventeen specific recommendations have been made, all focusing on systems and processes: six quick wins that have already been actioned, seven further actions, and four aspirational actions that the Panel would like CHL to work towards.

Introduction and background

1.1 The Panel chose to scrutinise the Customer Service Centre (CSC) because, earlier in the year calls regarding the housing register and housing options had been redirected to a department in Cornwall Council. Despite this, call numbers to Cornwall Housing still remained relatively high.

1.2 We identified the following question:

Why do we receive this number of calls, and could they be handled more effectively?

Methodology

2.1 Benchmarking

• We compared the Cornwall Housing Ltd (CHL) customer promise against other social housing providers.
• Made calls and mystery shopped other contact centres.

2.2 Desktop review

We requested key documents and received extensive and detailed information to review, including:

• Recent history of the Customer Service Centre.
• Self-identified challenges.
• Details of call logs.
• Customer Promise and procedures.
• Details of IT systems used.
• Performance information and limits to current reporting capabilities.

2.3 Interviews

To further our understanding, we interviewed:

• Customer Service Manager,
• Head of Customer Services and Engagement,
• Spent time sitting with Customer Service Advisors (CSA) while they received calls.

It became apparent that the IT systems were limited. So, to learn more about this, we interviewed:

• Head of Business Systems,
• Exec Director of Resources.

2.4 Surveys

To understand the customers experience, we invited tenants who had recently contacted Customer Service to complete an online survey.

To understand the CSA experience and challenges we asked 6 CSAs to answer 4 questions.

Overview

3.1 CSC has gone through recent changes.

3.2 Identified challenges: telephony system, IT and hardware, a new repairs contract which will impact CSC and poor customer data.

3.3 The plan going forward is to resolve more issues at first point of contact by the CSA.

3.4 CHL, as a Cornwall Council (CC) owned company, uses shared services which are managed by CC and this restricts some areas of CHL's independence.

Findings

Overall, we found that Customer Service Advisors provide a great service in difficult circumstances.

4.1 Benchmarking

We looked at other social housing providers customer service website information and phoned some customer service centres.

We found:

- Some social housing providers had better telephone systems allowing more flexibility e.g., text talk, request call back.
- A variety of customer promises, some specific and realistic about their promise. CHL customer promise contains 'aims' which are less accountable than a policy and seemed unrealistic.
- One reference number which remains with each issue throughout its progress.
- CHL has limited communication options and technologies compared to other providers, e.g., apps, chat box.

4.2 Findings from the interview and documents from Customer Service Manager and Head of Customer Services and Business Support

- The Customer Service Centre still receives many Homechoice calls in error. Calls to CHL come via Cornwall Council phone system with a menu of numbers and the housing number (161) still includes Homechoice as an option. This could result in more Homechoice calls coming to CHL.
- The automatic email response, from the contact centre email address, did not ask for tenants' details which are needed before an issue can be logged.
- The Open Housing/Customer Relations Management (CRM) IT system is not fit for purpose. The issues we feel are most important are:
  - o We can't drill down to analyse the calls data in all the ways we would like, because the IT system does not allow it, i.e., number of repeat calls for the same issue. The tenant survey showed this is important because 53% of respondents rang in more than 4 times about the same issue.
  - o Jobs are not clearly tracked, and CSAs cannot easily see the relevant information for follow up and to provide answers. The time this takes the CSA could lead to frustration, inefficiency and repeat calls.
  - o Reported issues do not have a unique reference number throughout their journey.
  - o Double handling occurs, requiring the transferring of information from CRM to Open Housing (copy and pasting)
  - o Multiple calls reporting repairs for a shared building or street cannot be grouped together due to CRM being a person-based system. The repair will be recorded against the address of each person who reports it. This can duplicate work and cause inefficiencies.

We phoned other customer service centres, here is what we've found

4.2 continued

- o Vulnerability, diversity and communication needs are not indicated on the front screen and have to be searched for.
- o. Drop down options, which record the types of issues, are not always appropriate i.e., there is no option for damp and mould. If these options are changed then the escalation/ workflow behind the name remains unaltered. This means the issues are not directed to the right team.
- o Inaccurate KPIs due to restraints of CRM. The current Power BI report for telephony is managed by CC. Edits to the report have to be requested from them which takes some time and may not be carried out.
- o New systems have been researched. Salesforce, which can overlay CRM and improve its functionality to benefit customer service and Netcall, which is an independent system which would benefit whole of CHL.
- o Introduction is reliant on available funding.

- Communication and responsiveness of some teams within CHL is poor e.g., Housing Management Officers and Surveyors.
  - o Staff are not available to take calls.
  - o Customers do not get a response from the relevant team.
  - o Staff don't always update CRM.
  - o CSAs don't have enough information to answer a query.
- Training and support for CSAs is comprehensive.

4.3 Findings from sitting with CSA

The panel spent a couple of hours talking with CSAs to understand their role and listened to some calls received.

- The CSA that we observed showed great professionalism and skill in understanding and relating with customers.
- The IT hardware provided is not good enough for all the systems that the CSAs constantly need to access in the course of their role.
  - o They have one laptop and one screen which are of a different size.
  - o The headsets are wired.
- The Mitel phone system is old, but we found the CSA are making the best of the tools available.
  - o The customer survey showed that 83% of respondents contacted Customer Service via phone indicating that a good operating system is important.

4.4 Findings from CSA survey

• CSAs feel supported by each other and managers.
• Frustrations arise from lack of updated information from other teams.
• CSAs are the frontline when customers receive a poor service, and this can be challenging.
• CSAs are generally happy with the systems, but the Panel observed that they may have become used to finding ways to manage with what they have.

4.5 Findings from interview with Head of Business Systems and Exec Director of Resources

• Improvements to technology are all constrained by limited budgets.
• The Mitel Telephony system functions is provided by CC and will only be replaced when the Council changes their system.
     o One possibility for the future may be to manage calls through Microsoft Teams.
• Work will be done to improve CRM and OH in the near future.
• It is possible to make information on CRM more user friendly.
• They hope to see big improvements for customer experience in 12 to 24 months.
• Before we embrace new technologies, we need to be confident that our data and the systems that sit behind them are accurate and working well.
• There is an aspiration to introduce something like Salesforce across a number of departments.

4.6 Findings from the Customer Survey

We sent an email to customers who had recently contacted the Customer Service Centre inviting them to complete an online survey. 39 people responded online and 3 were contacted by a member of the panel and completed the survey on the phone. This is a small number, but it gives a snapshot of these customers' experience. They were asked about their last contact. Below is a summary of the most relevant results.

• The majority of customers contacted Customer Service via the telephone and found the call options clear. 57% were happy or very happy with their last communication.
• 23% reported their issue was resolved by the CSA.
     o This is lower than performance indicators suggest but the indicators are unreliable due to CRM reporting limitations.
     o Customer Service are looking at ways to increase the number and type of issues that can be resolved at first point of contact by the CSA.
• Out of the 77% of customers who said their issue was not resolved at this point, 53% called back over four times about this same issue. (Appendix A).
     o This indicates that the issues which CSA are unable to resolve (those which need another team to respond to or action), are not being dealt with in a timely manner.
     o This supports the previous finding that communication and responsiveness of some teams within CHL is poor.
     o It seems repeat calls could make up a significant proportion of the calls received by the contact centre.

• 76% of respondents felt they were treated with dignity and respect. 19% responded no to this question but we felt considering the nature of the calls and the difficult messages that sometimes need to be delivered, that this number is relatively low.
• 42% of those customers with a communication need had to state what their need was.
     o Hopefully this will improve now that communication needs are flagged on the home screen (see quick win recommendation below).
• Only 29% of customers with a communication need were asked if anything had changed or needed updating (Appendix B).
• Of the customers who needed a response from another department, 64% were contacted by their preferred method.
• The length of time customers wait for their call to be answered shows the CSAs are under some pressure (Appendix C).
• 71% said they would be happier holding on, if they knew they were in a queue.
• The availability of alternative ways of contacting customer services in the future was popular.
     o Preferred options were text, followed by an App. Only 4 customers said they would not use any alternatives.

Customers were asked for 3 words that best describe their overall experience.

This graphic below shows the variety and frequency of these words. The bigger the word the more often it was mentioned. Based on our research and findings we feel that some of the dissatisfaction expressed here is more do with an unpopular message rather than the messenger.

5. Conclusion

5.1 We asked the question: 'why do we receive this number of calls, and could they be handled more effectively'?

In our investigation we found that despite Homechoice and Housing Options enquiries now being handled by a different department, some of these calls continue to come to the CSC.

We learnt that CHL housing stock is old and requires a high number of repair calls. This will remain high while CHL undertakes the long-term programme to improve condition of homes. We found limitations in the CRM/OH system leads to unreliable or unavailable performance indicators. However, in our discussions with staff we found there is anecdotal evidence, and our resident survey indicates, that there are many repeat calls. It seems this is a result of poor customer service from other CHL departments.

In addition, there is lack of information available to CSAs to resolve issues on the first call, which the management team are currently working on improving.

We suggest the calls could be handled more effectively by updating the technology available to CSAs and improving the response rates of the departments across CHL. Our recommendations are listed opposite.

Recommendations

6.1 Quick wins (these recommendations are already being actioned)

1. Head of Business Systems to sit with CSAs to look for solutions to hardware issues.
     • no quick fix found.
2. Amend the automatic email response and ask for tenant's details.
3. Enable customers, when they phone in, to hear their position in the queue.
4. Update CRM so flags indicating vulnerability, diversity and communication needs are positioned on the home screen.
5. Update OH workflows to ensure that callback requests are directed to the correct member of staff, which would enable swift action and better monitoring of outstanding callbacks required by managers.
     • This is currently being worked on.
6. Reduce reliance on CC Power BI.
     • We now have a specialist team in CHL who are able to create new reports.

6.2 Other recommendations

1. A second landscape screen provided for CSAs.
2. Wireless headsets would enable CSA to stand and move around and still be available to respond to calls.
     • Funding is being looked into.
3. New repair contractors to be able to track their work using the same unique reference number given by CSA when logged.
     • When awarding the new repairs contract, check this is possible.
4. Solutions to be found to support and enable teams across CHL to improve their communication and response rates with customers and CSA.
5. Purchase a telephone system (Salesforce or Netcall) to improve the current CRM/OH system and provide better functionality.
6. Request CSAs to ask customers if any details have changed, i.e., contact details, communication needs, health needs.
7. Make an addition to the message that a customer hears when calling in, detailing which are the less busy times.
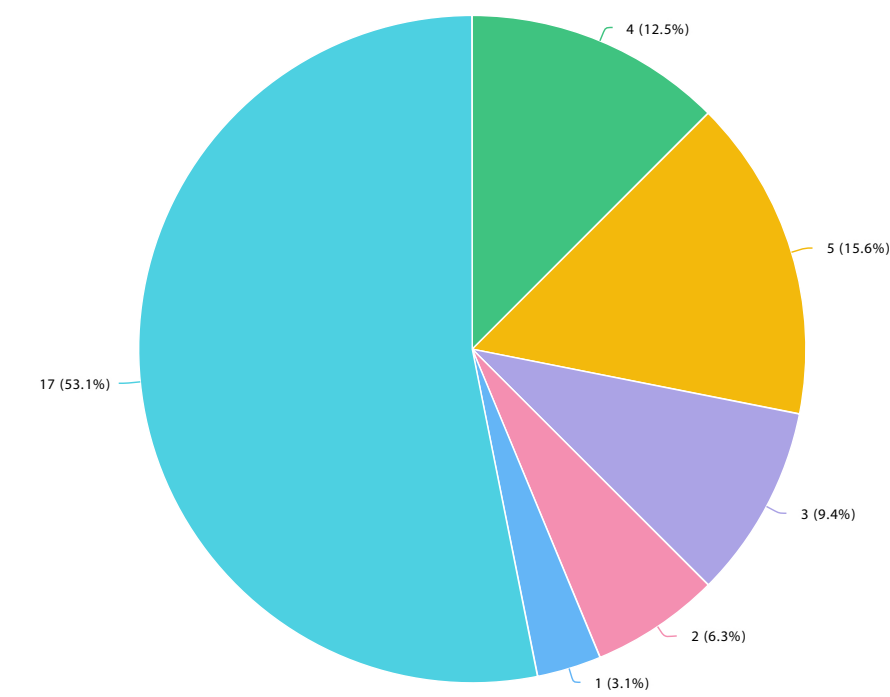
6.3 Aspirations

1. A CHL phone number independent of Cornwall Council.
2. Improve/change/replace CRM/OH.
     • put more pressure on Capita to respond to queries/issues.
3. Independent access to Power BI.
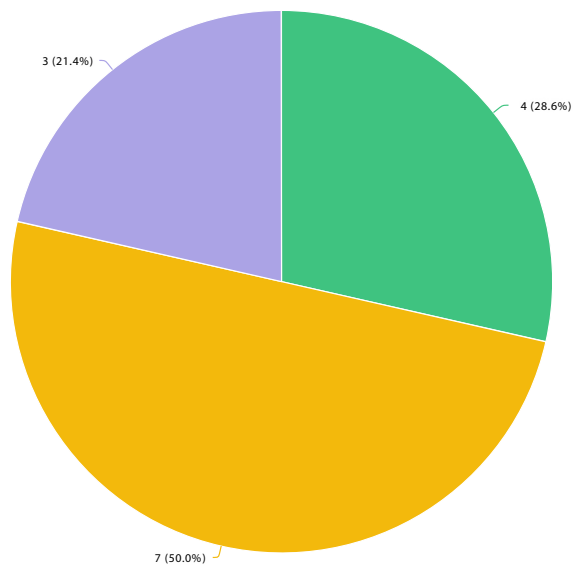4. Introduce new communication technologies for customers, i.e., apps, chat box.

Appendices

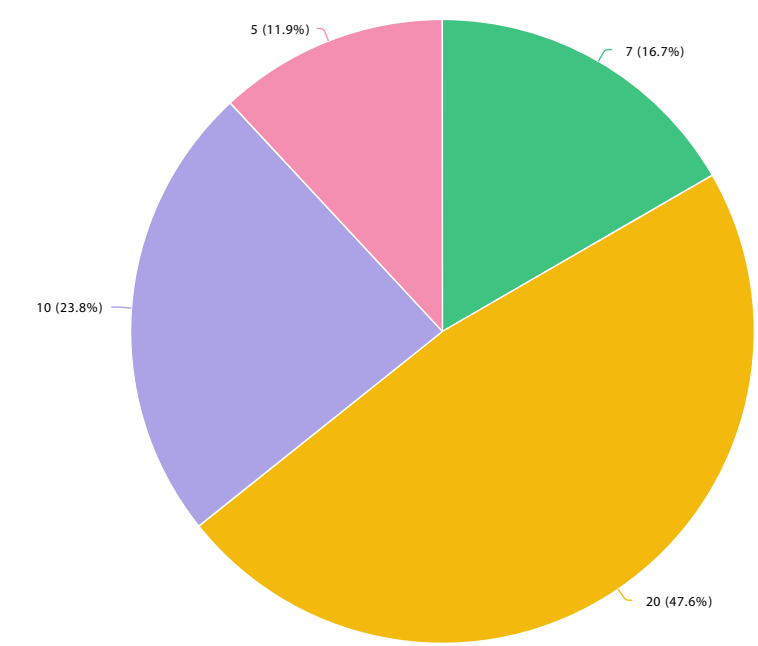## Appendix A: How many times did you have to ring again about this issue?

4 (12.5%)
5 (15.6%)
3 (9.4%)
2 (6.3%)
1 (3.1%)
17 (53.1%)

Question options ● 0 ● 1 ● 2 ● 3 ● 4 ● more than 4

Appendix B: Were you asked if your needs have changed and need updating?

3 (21.4%)
4 (28.6%)
7 (50.0%)

Question options ● Yes ● No ● Not applicable

Appendix C: If you phoned in, how long did you have to wait for your call to be answered?

5 (11.9%)
7 (16.7%)
10 (23.8%)
20 (47.6%)

Question options ● Less than 1 minute ● Between 1 and 5 minutes
● Between 5 and 10 minutes ● Over 10 minutes

To find out more about Tenant Led Scrutiny at Cornwall Housing visit: www.cornwallhousing.org.uk/scrutiny