



Resident Scrutiny Panel

Review 11

TO REVIEW CUSTOMER SERVICES

OCTOBER 2019

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INDEX

Sections	Page No.
1. Introduction	4
2. Selecting the Review	5
3. Scoping the Review	6
4. What the Panel Did	7
5. What the Panel Found	8
6. Recommendations	18
7. Management Response and Action Plan	21

1. INTRODUCTION

- 1.1 This report by BVT Scrutiny Panel, based on a review undertaken from October 2019 to June 2020, looks at customer service within BVT and shares ideas on how to provide a modern, customer-focused approach that fits BVT's new corporate plan and values.
- 1.2 The report makes recommendations for consideration by BVT Trustees and senior management.
- 1.3 The implementation of any agreed recommendations will be monitored through the Executive Team and Scrutiny Panel.
- 1.4 Scrutiny Panel thanks all staff who helped with this review.
- 1.5 It has been noticeable and gratifying during the current Covid-19 pandemic crisis that the Trust has played a key role, providing critical support, not just to its own residents, but also to the people of Birmingham in general. We are sure that for the future, the Trust will use the experiences gained and the initiatives used during this period as a means of injecting additional value to its customer services provision.

2. SELECTING THE REVIEW

- 2.1 KPI information illustrated concerns about percentage of calls answered which were significantly below target (Bournville), and the Acuity survey (Lawley and Lightmoor) showed dissatisfaction with call back and follow up.
- 2.2 Customer Services Team/Call Centre has been established for a few years, and Scrutiny members have been advised in the past to allow the service to 'bed-in'. Now would appear to be an opportune time to see how the service is progressing.
- 2.3 All residents (tenants and homeowners) use Customer Services, so it was felt this was a particularly important service as it affects all tenures. The term 'customers' throughout this report is used for all residents and non-residents who use BVT's services.
- 2.4 This is a key frontline service that creates a perception of the culture of BVT, in the way customers feel about the service they receive. It is, therefore, important to 'get it right'.
- 2.5 Building organisational strength – making sure the culture, approach and behaviours reflect the values as in BVT's new Corporate Plan.
- 2.6 Developments in the sector have focused on Customer Services' meeting the needs of clients both face-to-face and through digital communication. This creates a cycle of value for money as business is dealt with efficiently, and communication is clear – meaning less wasted time and damage to reputation.
- 2.7 HouseMark's new Star Questions include an emphasis on how easy residents find it to deal with their landlord. Landlords making interactions with tenants simple and straightforward is likely to have a big impact on satisfaction levels.

3. SCOPING THE REVIEW

- 3.1 To investigate customer service within BVT and share proposals about how to provide a modern, customer-focused approach that fits BVT's new corporate plan and values.
- 3.2 The review, though focusing on the service delivered by the Customer Services Team (CST) at 350 Bournville Lane, will cover good customer service practice across the whole organisation.
- 3.3. The review will explore the relationship between customers, CST and the handover to other service delivery teams.
- 3.4 Telford currently provides customer service locally and this is going to change. The review will include the Telford perspective and explore how this change could be managed sensitively.
- 3.5 The review will identify good practice within BVT, other housing organisations and outside the Housing sector.
- 3.6 The review aims to identify possible improvements to communication, information and feedback with and to customers to aid better customer service.
- 3.7 The review will investigate the training and induction of staff across the whole organisation regarding customer service.
- 3.8 Panel members are keen to include some investigation around BVT's customer service approach to diversity and dealing with difference. The review will include some insight from a young person's perspective but members are aware that diversity issues go wider than that, and acknowledge that BVT should investigate this further.

4. WHAT THE PANEL DID

- 4.1 The Panel interviewed key staff members to ascertain an overview of the service – Arthur Tsang and David Price in October 2019.
- 4.2 The Panel reviewed all internal BVT data relevant to customer services – desktop research.
- 4.3 The Panel investigated customer service in other housing associations – via website research and phone calls.
- 4.4 The Panel investigated generic good practice in customer service outside the Housing sector – use of online and portals by NHS, utilities etc.
- 4.5 The Panel gathered customers' views on the service from a variety of sources:
 - a. Birmingham customers' satisfaction with CST through the data collected by BVT.
 - b. Telford perspective through an organised meeting with residents, with prepared questions.
 - c. Case studies written up about Panel members' own experiences of customer service, both positive and negative.
 - d. Feedback from customers about the out-of-hours' service.
 - e. Feedback from young people on their experience of customer service.
- 4.6 The Panel listened to frontline CST staff views at both Birmingham and Telford – the different processes and perspectives.
- 4.7 The Panel investigated process mapping to understand the communication and handover process between CST and other teams.
- 4.8 The Panel gained a basic overview of BVT's Customer Relationship Management (CRM) system – how it works and should aid customer service across the organisation.

5. WHAT THE PANEL FOUND

5.1 Input from two key staff members to get an overview of customer service

Arthur Tsang and David Price attended the October 2019 Panel meeting to help Scrutiny members gain an understanding of how customer service operates within BVT. Panel members prepared a series of questions in advance (**APPENDIX A**) and staff spoke frankly and honestly about the service, and how it has changed and developed over the last few years. Below are the main findings:

- a. The Customer Services Team (CST) was established at 350 in 2013 following closure of local offices.
- b. Staffed by six full-time plus two part-time advisors.
- c. Provision to appoint by January 2020 a Team Leader, supported by the recruitment of a 'floor walking' Senior Advisor able to resolve issues 'dynamically'.
- d. BVT's Telford estates currently retain their own local Customer Services set-up.
- e. CST has a Process/Systems Manual. It is a live document continually updated as teams and processes change. The Panel was provided with copies.
- f. BVT's CRM system has a computerised 'contact management/integrated response' tool with which CST processes customers' enquiries. The efficiency of CST depends to a great extent on the full and effective use of the CRM system across the whole organisation which, we were told, was too frequently not the case. This results in the need to chase up other teams to progress agreed actions (for customers).
- g. The other challenges to providing an efficient service were: maintaining adequate CST staffing levels, frequent changes in BVT processes and procedures and, on occasion, some unrealistic resident expectations.
- h. KPIs are produced on a quarterly basis. Satisfaction with customer service is collected by randomly selected monthly customer call-backs by the BIU Team.
- i. Positive responses cite successful outcomes because of advisors' knowledge and experience, politeness, relatively short call-waiting times and simple two-step call options once connected, and the expedient directing of enquiries to other teams where necessary.
- j. Negative responses mention delays to call connections and to forwarding of documentation, non-delivery of promised call-backs, and poor communication in general.
- k. BVT is working to create a new organisation-wide customer service statement, a Customers' Charter.
- l. A new complaints procedure is in the process of being signed off.
- m. Training: New Customer Services advisors receive intensive training as part of their induction. Training is updated with the whole team as organisational processes change, and is augmented by on-the-job support and colleague shadowing.
- n. An integrated customer communication system combining telephone, email and online enquiries is being installed for 2020.

- o. The new telephony system will provide enhanced functionality with automatic call-back and improved 'hold' messages.
- p. The most frequently received enquiry topics mainly concern property issues – repairs, servicing, housing applications, solicitors' property purchase issues, and property alteration requests.
- q. Other topics include ASB, fly tipping, parking issues, rent payments, and also SeeMyData registrations/enquiries.
- r. Recent increased CST recruitment activity is in part the consequence of promotion of CST staff to other teams. This movement is regarded as healthy as the recruitment of new advisors brings with it fresh ideas.
- s. Newly-recruited advisors do not necessarily need previous customer service experience; they need to be the right kind of person for the job, possessing good attitude and manners.
- t. Advisors are tasked to ask searching questions of callers for a correct diagnosis of a problem so as to facilitate the correct response, either directly by CST or via the appropriate service team.
- u. The aim where possible is for CST to maximise service efficiency by delivering a 'first-time fix'.
- v. If not providing sufficient or correct details, written, emailed, texted or online enquiries can take longer to deal with while clarification is sought and received.
- w. Currently one part-time advisor, allocated to handle email enquiries only, deals with an average of around 30 emails daily.
- x. Halton Housing was generally cited as providing a 'gold standard', purely online customers' communication system, and worth a look at by Scrutiny Panel. Is it as good as claimed?
- y. Also Black Country Housing, of similar size to BVT, would be worth looking at in comparing customer service practices.
- z. It was suggested that it would be useful for the Panel to talk to some of BVT's other service areas about customer service, e.g. Estates, BPS and Community.

5.2 **Review of BVT Internal Data Relevant to Customer Services**

Panel members were provided with KPIs for September to December 2019, and call statistics by Mike Parsons, Senior Customer Services Advisor, (**APPENDICES B1 to B6**).

- a. KPIs – Performance is focused on calls to CST and not on broader customer services operations. Customer services is wider than the call centre and BVT needs a 'customer services culture' across the whole organisation. KPIs need to reflect this.
- b. KPIs – percentage of calls answered increased as the volume of calls decreased over four months; however, complaints increased as did targeted response times.
- c. 20-30% of calls are repeats following lack of communication once passed to other teams.
- d. Few customers are using online options.

Most Useful Findings for Total Volume of Inbound Calls

- a. The busiest time of the year is the beginning of the year and the summer months, most specifically January and August. Calls to CST are weighted towards repairs in the early part of the year (effects of winter?) while at other times enquiries cover a wider range of issues and needs.
- b. The end of the year is the quietest, specifically December.
- c. 'Calls Offered' and 'Answer Percentage' do not always correlate. Peaks and troughs in call demand during specific times of the year, week and day require additional support or changes to schedules to adapt (**APPENDIX C**). This all affects the 'Answer Percentage' which in turn is affecting the level of customer service provided.
- d. No yearly increase in the volume of inbound 'Calls Offered'.
- e. Overall, while calls to request repairs are the largest single element, the majority of calls relate to the wider range of issues and needs referred to above (5.2a).
- f. 'Average Handling Time' has increased overall. But Repairs calls have increased considerably more than CST calls. Since 2018, Repairs calls are now slower than CST calls.
- g. 'Answer Percentage' has gradually dropped over the past two years.
- h. There seem to have been shifts in certain call demands over the past year or so, which have not occurred before and which affect the statistics over recent times.

5.3 Customer Service in Other Housing Associations

For comparison, the Panel looked at other housing associations – Halton, Hyde and Black Country. This was carried out via browsing and using their websites, and telephone calls (**APPENDIX D**). Some of the main findings were:

- a. They have a range of interactive communication functions that can be utilised as part of effective customer service.
- b. The website is one of the main methods of interaction with customers and, as such, affects/reflects standards/opinions of customer service.
- c. The format and interface of the website makes a big difference to how easy it is for customers to access what they need.
- d. Online functions included, but were not limited to, live chat, mobile apps, 'browse aloud' facility, job/issue tracking including previous job/issue history and customer feedback.
- e. Dedicated pages/forms on website for customer feedback, which are given an obvious profile, are easily accessible.
- f. There are functions which acknowledge and cater for diversity within the community, in particular levels of ability, literacy and disability.
- g. Where relevant, separate areas for tenants and homeowners.
- h. Many/most of these can be utilised as part of/incorporated into the website.
- i. Wider variety of/greater transparency in documentation, statistics, information made available.

- j. Key emphasis on/priority given to customer satisfaction within policy documentation and planning.
- k. Presentation of data for customers needs to be simple and succinct/easy to read and interpret. This should also be in a format which all can access.
- l. According to a 2019 Government/Social Housing paper, social housing should make 'customer-centricity' the core in its endeavours in improving its customer services.

Advice from the Chartered Institute for Housing

An earlier guide on delivering excellent customer service issued by the Chartered Institute for Housing anticipates this mantra by stating:

- a. Good customer service is a two-way process
- b. Listen to your customers and find out what they want
- c. Change your service so customers get what they want
- d. Ensure your staff put customers first
- e. Find out if customers are satisfied
- f. Keep customers informed
- g. The above steps are a continuous process

5.4 Customer Service Outside the Housing Sector

The Panel also looked at other organisations – the National Health Service, Marks and Spencer and Sainsbury's, Salesforce customer service systems (**APPENDIX D**) and Utilities (**APPENDIX E**). The main findings from this sector were as follows:

The National Health Service

- a. The NHS encourages involvement by stakeholders through its Patient and Participation policy by providing feedback channels for observations and complaints by patients, their family and friends on care and treatment, coupled with staff surveys for best use of feedback. The data gathered is published on its website to inform staff and public.
- b. The policy is promoted through various mediums – film and audio for use on websites, posters and leaflets, feedback forms, slide packs and including material for children and young people – and tested to check the effectiveness of these feedback channels, recognising digital exclusion as an issue for some.
- c. Locally, patients can avail themselves of online access to their GP surgery records, and to book appointments and order repeat medication.

Marks & Spencer

Very little information is available on its website about its much vaunted customer services, its systems, procedures and expectations. Its Customer Services is based on immediate, one-off and short-term resolution over a small range of issues – refunds, repairs, exchanges, etc. and is not seen as a continued 'invested' relationship.

Sainsbury's

The website concentrates on its products and services rather than any promotion of or link to customer relationship matters and company values. It does provide feedback links for shopping instore and online, but is not particularly user friendly.

Salesforce

Salesforce is a producer and seller of Sales, Servicing and Marketing products and systems, one of which is CRM (Customer Relationship Management) and has various elements which would be applicable to social housing and is currently working with some housing associations.

Utilities

- a. Customer Churn – Utilities understand, perhaps more keenly than the above retail outlets, that they need to maintain good customer service if they are to minimise 'churn' – which is when customers take their business elsewhere.
- b. Reasons for switching suppliers are financial i.e. price increase or other financial burdens but also poor customer service, e.g. failure to satisfactorily resolve issues.
- c. Engagement with customers to help them anticipate and manage changes creates a better customer experience and reduces churn percentage.
- d. Communication is key in creating a better customer experience and compensating for price increases by providing reasons and asking for feedback.
- e. Arrears can be managed better by more supportive measures as opposed to an authoritarian one.
- f. Proactive approach to communication is a much better approach than trying to win back customers after a negative experience. Keeping customers informed and supported is more effective.
- g. Messaging campaigns are effective and can be devised to 'drip feed' important information to customers in a controlled fashion, ideally best delivered in this digital age via static and mobile internet devices.
- h. Early information, e.g. on price and service changes and why, prepares customers for them and is likely to result in greater acceptance of the changes especially if price rises can be linked to service improvements.
- i. If customers are also given the option to comment on proposed changes this gives them agency, especially if accompanied by e.g. energy saving tips or other ways that allow the customer to mitigate the financial implications.
- j. A sympathetic approach to payment problems, allowing the customer to explain the problem and to allow suggestions for repayment options, is another example of providing agency.

5.5 Customer Satisfaction with CST

This information was drawn from a number of sources as follows:

Birmingham Customers

Through the data collected by the BIU Team, Mike Parsons, Senior Customer Services Advisor, provided Panel members with the Customer Services Satisfaction

Surveys for Quarters 2 and 3, 2019 (**APPENDICES F1 to F5**). The main findings were:

- a. Negatives – were due to call wait-times, follow-up and resolution.
- b. Positives – were when calls were answered quickly and repairs completed well.
- c. Satisfaction surveys – 50-60 calls reviewed per quarter:
 - i. Q3 (How satisfied were you with the outcome of your call and have all of the issues been fully resolved?) does not seem to be a fair reflection of the service CST staff are delivering as it needs to factor in other teams.
 - ii. Some concerns regarding security questions taking time, not being able to be put through to teams directly, requests for timescales to be provided.
- d. Some advisors received '10' for every other question except Q3 because the issue was not resolved by BPS correctly.
- e. Another reason was dissatisfaction with the time it took to get through to or hear back from other teams.

The Telford Perspective

Questions were compiled for residents (**APPENDIX G**) in Lightmoor and three Panel members visited The Oak Tree Centre on 4th March 2020 to discuss these in person. There were three male residents of varying ages and lengths of tenure.

Telford Residents

- a. In Telford, the three residents the three Panel members met were pretty satisfied with the customer service they receive:
 - i. It is easily accessed by whatever means the resident chooses.
 - ii. Phone calls are answered promptly and face-to face contacts are arranged quickly.
 - iii. Service requests are taken quickly.
 - iv. Staff understand the issues raised and ensuing action is speedy.
- b. However, they felt the customer experience could be improved by more feedback and information on progress following a request for service; good feedback would show genuine interest, treating you as an individual, not a 'number'. The responses should be read in conjunction with the Acuity survey findings, which were less positive.

Case Studies

The Panel looked at case studies – actual examples of customer service following contact with BVT. One case study was made available by BVT in February 2020 (**APPENDIX H**) and a further seven were provided by Panel members who had first-hand experience of contacting BVT (**APPENDIX I**). These were shared and discussed to identify key features of both good and bad customer service practice, and a summary produced (**APPENDIX J**).

- a. For many, examples of a positive strength were also identified as a weakness elsewhere e.g. showing initiative/lack of initiative, time efficient resolution/issues lapse without resolution.

Areas identified for comment in both negative and positive terms included:

- b. Efficiency and regularity of communication from BVT to customer.
- c. Methods of communication available to customer.
- d. Communication between teams within the organisation.
- e. Effective questioning by frontline staff in order to assess most appropriate course of action.
- f. Feedback to customer – promptness, frequency, regularity and method.
- g. Use of initiative by BVT staff.
- h. Professionalism shown by BVT staff both in-house and off-site.
- i. Ownership of and investment in tasks by BVT staff over short-term and prolonged periods.
- j. Options for customer to track progress.

Feedback from Customers on the Out-of-Hours' Service

In March 2020, a total of 20 tenants were asked about their experiences with the BVT out-of-hours' service, which is run by another company, and covers emergencies and issues when the offices/reception are closed (**APPENDIX K**).

- a. Every call made to the out-of-hours' service is important, just how important cannot be determined until the call is answered.
- b. Each call should be dealt with as an emergency until the details and facts that the caller provides prove otherwise.
- c. There seems to be an inconsistency in the level of facts and details that are asked for by the operator.
- d. There is an inconsistency in what constitutes an emergency.
- e. There are obvious inconsistencies in call handling manners and professionalism per call.
- f. You should not have to redial your emergency contact number several times.

Young Tenants

A survey (**APPENDIX L**) was taken of young tenants' experience of contacting CST. Three replies were received and they had all contacted BVT within the last few months. The summary of their comments are as follows:

- a. Positive comments – lovely lady, very helpful, informative, listened, good response, incredibly friendly and welcoming to the community.
- b. Negative comments – good response first time but not the second, problem was not taken seriously enough.
- c. Suggested improvements – listen more, be more understanding, video call option to show the problem.
- d. What makes good customer service – help and support.

5.6 Questions to CST Staff

Telford Staff

Questions were compiled for staff in Telford (**APPENDIX M**), and three Panel members visited The Oak Tree Centre on 4th March 2020 to pose these in person. There were five members of staff who took part in this informal interview.

- a. Current system is informal and friendly with customers able to approach BVT in person or by all manner of communications. This ensures an accessible, amenable service. While it may seem inefficient, staff believed it gives customers very positive feelings about BVT's customer care.
- b. Property repairs are managed from Birmingham via the CRM system (which Lightmoor staff are equipped to use). All other issues are normally and straightforwardly dealt with locally.
- c. A phased integration with 350 is planned to commence with the Housing Team, followed by the other teams incrementally. This will result in less direct contact between customers and the Telford staff; staff would still wish to provide some degree of a walk-in service.
- d. Residents are not aware of this planned change; BVT should plan to avoid a negative reaction.
- e. Telford staff are concerned that the integration will adversely affect the more vulnerable tenants; they suggest that these could continue to be directed (by 350 staff) to their known local contacts.
- f. While showing no resistance to the planned change, the Telford team believes that 350 staff are not so close to Telford residents and are not familiar with the situation, local issues and customers. They feel that 350 staff should visit and get first-hand knowledge of how the current Telford set-up operates to ensure a smooth integration process.
- g. Staff are confident that their service is good – responsive, informing and efficient.

Birmingham Staff

Three Panel members visited the CST in February 2020 to ascertain their view of the current situation (**APPENDIX N**). The general perception of staff movement from CST as career progression, combined with the lack of wider ownership, suggest CST (and customer service?) is undervalued by some in the wider organisation.

- a. Staff are happy with the training they received. They stressed the importance of on-the-job training and support from other team members. CST staff appear to enjoy the job and work well as a team, notwithstanding some more negative findings.
- b. Calls/callers vary from easy to handle (mostly), to stressed, to frustrated/angry. Some callers expect an answer or solution based on their first call. Staff have to explain the 'passing it on' is not 'fobbing them off'. As a result, teams should take more ownership of customer service, in particular those teams with the greatest day-to-day dealings with customers. Without organisation-wide ownership of customer care policy, CST's role and the CRM system, CST can become a defence mechanism for the rest of BVT.

- c. Where teams do not respond well to customers, it makes it harder to trace and remedy genuine flaws. There is no mechanism for flagging up unresolved non-urgent requests. It falls, wrongly, to the customer to chase the request.
- d. CST appears to be a springboard for career progression to other teams. Their move is a loss to the service as they take away their knowledge and experience. (By the same token, it could be said that they will add to the customer service 'culture' of those other teams but that was not stated nor, by implication, was there any evidence to that effect).
- e. Staff movement combined with the lack of wider ownership suggest that CST (and customer service?) is undervalued by some in the wider organisation.
- f. Scrutiny Panel may interpret this as:
 - i. Justified response to actual experience, or
 - ii. An expression of the pressure felt by staff who are the pinch-point between the wider BVT and its customers.
- g. When changes are introduced, these are not always well-communicated to residents. For example, when the payments system was recently changed (so that residents are required to pay online and can no longer read out a card number over the phone), this generated frustration and anxiety. For elderly customers, especially, more and better information is required.
- h. A new telephone system is being introduced. Staff were curious to know if it had certain features that would support their role. This suggests they had not been consulted about what a new system might do. If so, it is a missed opportunity to engage those who use the system for its most critical purpose and subsequently to give staff the insights to adopt a new system more promptly without the characteristic complaints that often accompany system change.

5.7 **Investigation of Process Mapping – to Understand the Communication and Handover Process Between CST and Other Teams**

Panel members studied the current CST Relationship Map (**APPENDICES O and P**). Although Panel members found it interesting, they felt they were not close enough to the delivery to understand the intricacies of how this worked in practice. It actually raised more questions than it answered. Below are some of the Panel's questions and thoughts:

- a. Has BVT done an analysis of historical call volumes in designing systems?
- b. How do operatives make the decision to transfer calls?
- c. How are multiple segment queries handled?
- d. Is BVT thinking about any 'in-queue' options to help customers 'self-serve'?
- e. For high volume call areas – will there be dedicated resources available to take calls?
- f. Will there be communications with teams receiving calls so that it feels a collaborative effort rather than a problem transfer?
- g. Will there be joint objectives incorporated into performance improvements?
- h. Will there be dedicated resources within receiving teams ready to take calls?

- i. Who has responsibility to ensure the customer is satisfied? And has had their issue resolved?
- j. What happens if there is no reply? Transferred back?
- k. How to measure call handling if there are multiple points of contact?
- l. Tracking – e2e if call is transferred?
- m. How to ensure consistency of message?
- n. How to learn from the customer contact/feedback?
- o. Does BVT think the cost of call handling may increase?
- p. Does BVT think that customer satisfaction may decrease as a result of multi-handling?

5.8 Gained a Basic Overview of BVT's CRM System – How it Works and Should Aid Customer Service Across the Organisation

Three members visited the Customer Services Team in February 2020 to learn about this system from David Price and staff.

- a. The CRM system is intended to be a two-way process requiring full team compliance to perform efficiently and effectively, but CST staff feel there is limited understanding and ownership, undermining its potential.
- b. This alleged reluctance to exploit the CRM system compounds the staff's concern about the organisation's capacity for excellent customer care and compounds the feelings of being undervalued, and the risk of becoming a defence barrier between BVT teams and discontented customers.

6. RECOMMENDATIONS

6.1 The Panel makes the following recommendations, in three themes – ‘Communications’, ‘Culture and Values’ and ‘Recruitment and Training for All Staff’.

6.2 COMMUNICATIONS

The experience of good customer service involves effective communication between all stakeholders. This includes communications from customer to BVT, from BVT to customer, and across different BVT teams. If communication is clear and transparent, it also creates a cycle of value for money as business is dealt with efficiently and effectively, meaning better use of time, greater satisfaction from customers and enhanced reputation.

Recommendation 1: Customer to BVT

Increase the accessibility of customer communications with BVT in the medium of their choice.

- a. Investigate the evidence already gathered around peaks and troughs in telephone call demand during specific times of the year, week and day that require additional support or changes to staffing schedules. Match these to suit the needs of the customer.
- b. Develop a portal or BVT App, live chat, and online access that allows customers to communicate their enquiries in a variety of methods which suit their needs.
- c. Develop responsive and efficient ways for customers to track the progress of enquiries they have made.
- d. Develop ways in which customers can directly access their previous customer history including, but not limited to, planning applications, repairs, payment history, complaints etc.
- e. Implement systems and tools whereby customers can give feedback more easily and regularly. Ensure that this enables feedback data to be used to produce regular customer feedback reports.

Recommendation 2: BVT to Customer

Improve how customers are kept informed about their ongoing enquiries and how new procedures are communicated clearly to everyone.

- a. Provide clear timelines about when a customer’s enquiry will be resolved and how this will be done.
- b. Provide prompt and ongoing notifications and/or updates to customers on the status and progress of their enquiry.
- c. With reference to the recent change to online payment methods, review methods of communicating change(s) to customers to reassure and gain compliance.
- d. Given the proposal to incorporate customer communications in Telford into the corporate customer services regime, devise a communications plan for the changeover that engages Telford customers in order to reassure and inform them fully, ensuring that all staff are sensitive to the potential impact of the change for customers and are equipped to respond appropriately.

- e. Provide good quality customer feedback data on the BVT website on a regular, frequent and accessible basis with background information and explanation, and facility for further customer comment.

Recommendation 3: Across Different BVT Teams

All teams should take ownership of customer service, in particular those teams with the greatest day-to-day interaction with customers.

- a. Improve the handover from CST to other teams along with an efficient method whereby frontline CST can easily access the status and progress of an enquiry beyond handover.
- b. Produce guidelines for frontline CST to ensure effective handover to correct teams, using the CRM system.

6.3 CULTURE AND VALUES

Good customer services is wider than the Call Centre and BVT needs to ensure a 'customer service culture' across the whole organisation. BVT has recently adopted new corporate values and these principles reflect an organisation that wishes to provide a high level of good customer service across all its staff teams.

Recommendation 4:

Complete the production of the BVT Customer Charter, reflecting how new customer service values will be implemented and actioned.

- a. Take into account the recommendations of this review when drafting the Customer Charter to ensure that it is both current and forward looking.

Recommendation 5:

Make 'customer-centricity' the core of BVT's endeavours to improve its customer services.

- a. Review and update both current and future policy and system documentation to reflect the organisation's commitment to making customer satisfaction its main priority.
- b. Review current practice to ensure that all areas of the organisation understand and are responsive to all the 'protected characteristics'¹ they may encounter in the community. Implement training, briefing and monitoring accordingly.
- c. Include customer service KPIs in all teams' performance management processes and documentation.
- d. In order to increase efficiency and ownership, ensure that relevant employees who may be impacted by changes in customer service are engaged in the consideration and implementation of any new system changes.

¹ These are age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation

<https://www.equalityhumanrights.com/en/equality-act/protected-characteristics>

Recommendation 6:

Develop transparency by making relevant policy and system documentation accessible to view on the BVT website. This should include, but not be limited to, current and future planning.

- a. Use current policy and system documentation and replace with new documentation as they are updated, based on recommendation 5a.

6.4 RECRUITMENT, AND TRAINING FOR ALL STAFF

In order to ensure that all employees subscribe to a customer services culture across the organisation, actions are required to incorporate this in recruitment, induction and training.

RECRUITMENT**Recommendation 7:**

Include customer services related personal qualities and interpersonal skills into recruitment documentation and job descriptions for all employees.

TRAINING FOR THE CUSTOMER SERVICES TEAM**Recommendation 8:**

Train all CST operatives to deal with not only the technicality of their job, but also the interpersonal aspects. In particular, focus on questioning, listening and empathy as necessary skills and qualities.

Recommendation 9:

Provide training for front desk staff to ensure that an agreed, appropriate and consistent approach is taken towards all customer service queries. In particular, focus on questioning techniques, developing initiative, identifying key concerns, identifying appropriate first/next steps, as well as a working understanding of the needs of different 'protected characteristics' in the community.

Recommendation 10:

Provide 'back-up' staff within the organisation, trained in customer service to ensure that the Customer Services Team is always fully staffed in accordance with daily/seasonal demands.

TRAINING FOR ALL STAFF**Recommendation 11:**

Provide training for all staff to ensure that they are fully familiar and compliant with appropriate identified values and approaches towards BVT customer service.

- a. Ensure all new members of staff spend a day shadowing CST.
- b. Provide all staff members with training on the CRM system to enable them to navigate and exploit the system, followed by ongoing refresher training.

Customer Service Work Plan Review (No. 11)
Short – 2020/2021, Medium – 2021, Long - 2022

REF	ACTION	TEAM/ OWNER	RESPONSE	RAG	SHORT/MEDIUM/ LONG TERM
Recommendation 1: Customer to BVT					
Increase the accessibility of customer communications with BVT in the medium of their choice.					
1.1	Investigate the evidence already gathered around peaks and troughs in telephone call demand during specific times of the year, week and day that require additional support or changes to staffing schedules. Match these to suit the needs of the customer	Head of Housing and Customer Services, CST Team Leader	<p>We agree that this is useful insight. The team regularly review demands to support staffing levels. The team already manage annual leave/ flex and other absences using this information. Our new phone system also provides more flexibility with reporting..</p> <p>Action: To continue to analyse data in report to plan for peaks and troughs in year.</p>		Ongoing
1.2	Develop a portal or BVT App, live chat, and online access that allows customers to communicate their enquiries in a variety of methods which suit their needs	Head of Housing and Customer Services (Lead), Business Improvement Unit	<p>BVT is exploring the use of an App and Live Chat to allow customers to have multi-channel access. This does link in to the wider ICT Strategy which will be in progress in 2021. The current telephone system does require further testing of additional 'bolt on' functionality – queue identification, voicemails, call backs etc.</p> <p>Action: Demo of 'Chat Bot and 'Futr' Live Chat' systems. Feed into IT project 'See My Data'</p>		<p>Long</p> <p>2021 – QTR 1 develop use of live chat</p> <p>2021 – ICT Strategy Review</p>

1.3	Develop responsive and efficient ways for customers to track the progress of enquiries they have made.	Arthur Tsang	All teams are expected to updated systems to ensure CST can provide updates directly to customers. We acknowledge it would be more efficient to have customers be able to track their own cases so this will be incorporated in the ICT Review and upgrade of 'See My Data' to explore the possibility of this functionality. Action: To be included within ICT strategy review and upgrade of 'See My Data'		Long 2021 – ICT Strategy Review
1.4	Develop ways in which customers can directly access their previous customer history including, but not limited to, planning applications, repairs, payment history, complaints etc.	Arthur Tsang	Repair history can be accessed currently through 'See My Data' as well as current payment history. 'See My Data' upgrade in QTR 1 should improve accessibility and level of data contained on system. Support will then be needed to ensure all types of customers can log on and access all previous available interaction history.		Ongoing 2020 – See My Data Upgrade
1.5	Implement systems and tools whereby customers can give feedback more easily and regularly. Ensure that this enables feedback data to be used to produce regular customer feedback reports.	Business Improvement/ Claire Page	Our current feedback programme includes online, email, postal, telephone and complaints workflow is in place to connect feedback to staff. All customers where there are Repairs, Voids and Lettings and ASB cases are contacted directly for feedback. Complaint and Compliment Policy has recently been updated and new reports are in the process of being automated which we will then publish. Action: To work with BIU to improve access this online.		2021 - QTR 1

Recommendation 2: BVT to Customer Improve how customers are kept informed about their ongoing enquiries and how new procedures are communicated clearly to everyone.					
2.1	Provide clear timelines about when a customer's enquiry will be resolved and how this will be done.	Heads of Service	<p>All services have Service Standards in place and published on our website under 'Publications > Your BVT' https://www.bvt.org.uk/publications/your-bvt/</p> <p>Currently we acknowledge all enquiries at point of receipt; each service differs in terms of timescales which CST are aware of to inform customers. (Certain tasks such as Mutual Exchanges have legally set timescales). Currently the majority of frontline services are under review which will include timescales to be agreed. Links to 1.4.</p>		2021 – Throughout delivery of annual plan project reviews.
2.2	Provide prompt and ongoing notifications and/or updates to customers on the status and progress of their enquiry	Heads of Service	<p>Links to 1.3 and 1.4. All Officers allocated actions are responsible for updating customers; CST have access to all areas of our case management system so can also provide updates as long as these have been included.</p> <p>Action: Further training on CRM use is required and forms part of the ICT Strategy.</p>		Ongoing
2.3	With reference to the recent change to online payment methods, review methods of communicating change(s) to customers to reassure and gain compliance.	Claire Page	<p>All fundamental system or Policy changes are communicated via: Website, Facebook, Inview Magazine and, where required, bespoke communication (block notices, letter drops). A change to the Lettings Portal will also follow this communication plan.</p> <p>Action: BVT to continue to work with Claire Page, PR and Comms Manager, to ensure communication is explored for all changes.</p>		QTR 4 2020 and QTR 1 2021 for Lettings Portal.

			Where required we will also provide guidance to customer on these changes.		
2.4	Given the proposal to incorporate customer communications in Telford into the corporate customer services regime, devise a communications plan for the changeover that engages Telford customers in order to reassure and inform them fully, ensuring that all staff are sensitive to the potential impact of the change for customers and are equipped to respond appropriately.	Head of Housing and Customer Services	The plan was to complete this in 2020; this was delayed due to COVID and staffing challenges in our team. This will be explored in 2021; as with 2.3 this will be delivered in conjunction with customer consultation and engagement. Action: To agree formal handover of customer service and update community/staff		To begin in QTR 1 2021
2.5	Provide good quality customer feedback data on the BVT website on a regular, frequent and accessible basis with background information and explanation, and facility for further customer comment.	Claire Page	We publish customer feedback data as part of our Annual Plans; we have also started to publish customer feedback data as part of our Design Guide review with other service reviews to follow. Action: To continue to update website and encourage discussions around feedback data. Review how other areas of feedback can be uploaded more regularly.		2021
Recommendation 3: Across Different BVT Teams					
All teams should take ownership of customer service, in particular those teams with the greatest day-to-day interaction with customers.					
3.1	Improve the handover from CST to other teams along with an efficient method whereby frontline CST can easily access the status and progress of an enquiry beyond handover.	Heads of Service	Please see action point 2.2 . Review of Customer Services Team will begin in QTR 1 2021		QTR 1 2021 Ongoing
3.2	Produce guidelines for frontline CST to ensure effective handover to correct teams, using the CRM system.	Head of Housing and Customer Services	CST are the most trained on CRM and already operate with a 'BVT bible' containing all pertinent information to support them in delivering their role – we are continuously		2021 Ongoing

			improving the quality of information and methodology for effective handovers. Action: to continue to review as part of all service reviews.		
Recommendation 4: Complete the production of the BVT Customer Charter, reflecting how new customer service values will be implemented and actioned.					
4.1	Take into account the recommendations of this review when drafting the Customer Charter to ensure that it is both current and forward looking.	Arthur Tsang/ Claire Page	A first draft 'Customer Charter' has been drafted for approval. This draft will focus on a small number of simple, key pledges that will then be developed through delivery of corporate plan projects. Action: Share draft of 'Customer Charter' with Panel when approved.		QTR 1 2021
Recommendation 5: Make 'customer-centricity' the core of BVT's endeavours to improve its customer services					
5.1	Review and update both current and future policy and system documentation to reflect the organisation's commitment to making customer satisfaction its main priority.	Arthur Tsang/ Claire Page	Our 2020 Corporate Plan sets out, through our values, the importance of delivering services with our customers at the centre of this. All Policy Docs include this within them as part of the corporate template.		Ongoing
5.2	Review current practice to ensure that all areas of the organisation understand and are responsive to all the 'protected characteristics' they may encounter in the community. Implement training, briefing and monitoring accordingly.	Cheryl Garvey	All staff are required to complete ongoing training on equality and diversity; 2020 has made this a priority in how BVT approaches services. Significant changes to Policy and Procedure complete an EINA (Equality Impact Need Assessment) to ensure that all protected characteristics are considered. Action: We will continue to review all policy and procedures to ensure they are		Ongoing

			responsive to protected characteristics'. Staff will continue to complete mandatory training, briefings including through monitoring of complaints.		
5.3	Include customer service KPIs in all teams' performance management processes and documentation.	Business Imp	<p>We have a large suite of KPIs which include:</p> <ul style="list-style-type: none"> • Satisfaction with ASB, Lettings, Voids and Repairs • Satisfaction with Call Handling in CST • Complaints <p>Customer experience is measured by our feedback programme across all services offered, the results are reported as KPI's. KPI's are also being reviewed annually as part of the delivery of the corporate plan.</p> <p>Action: To continue to include customer service as part of our performance management</p>		Ongoing
5.4	In order to increase efficiency and ownership, ensure that relevant employees who may be impacted by changes in customer service are engaged in the consideration and implementation of any new system changes.	Business Improvement	All frontline staff are consulted on Policy and Procedure Changes as standard. CST were included in rollout of new telephone systems and are consulted through regular team meetings as well as being included in all process mapping workshops or consultations.		Ongoing

Recommendation 6: Develop transparency by making relevant policy and system documentation accessible to view on the BVT website. This should include, but not be limited to, current and future planning.					
6.1	Use current policy and system documentation and replace with new documentation as they are updated, based on recommendation 5.1	Claire Page	<p>All Policy documentation is updated through a central monitoring procedure internally. The website is then updated as and when these are approved.</p> <p>Action: To continue to update and review policy and service statements on BVT website</p>		Ongoing
RECRUITMENT Recommendation 7: Ensure that all employees subscribe to a customer services culture across the organisation, actions are required to incorporate this in recruitment, induction and training.					
7.1	Include customer services related personal qualities and interpersonal skills into recruitment documentation and job descriptions for all employees.	Neeta Chauhan	We recruit against the BVT Values through robust recruitment processes. All new Job descriptions include specific links to our Aims and Values and interviews will require applicants to demonstrate this.		Ongoing
Recommendation 8: Training for the customer services team.					
8.1	Train all CST operatives to deal with not only the technicality of their job, but also the interpersonal aspects. In particular, focus on questioning, listening and empathy as necessary skills and qualities	Mary Welch	<p>Regular training is in place to develop skills and reflective practice. We will feed this recommendation into the plan to host regular refresher training across a range of topics on a 6 monthly cycle.</p> <p>Action: Put in place training and review</p>		Ongoing

**Recommendation 9:
Training for Customer Services Team.**

9.1	Provide training for front desk staff to ensure that an agreed, appropriate and consistent approach is taken towards all customer service queries. In particular, focus on questioning techniques, developing initiative, identifying key concerns, identifying appropriate first/next steps, as well as a working understanding of the needs of different 'protected characteristics' in the community.	HR/ Mary Welch	We are exploring techniques for deeper questioning as part of our 6 month refresher training. We have introduced new products such as Locator Plus to diagnose repairs, Noise App which records localised noise problems and Reportable which will identify better quality information relating to environmental crime. Utilising more inquisitive techniques beyond phone conversations. The inclusion of Shropshire calls to our CST team has also improved consistency. Action: to put in place training and review		Ongoing
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**Recommendation 10:
Supporting Customer Services Team.**

10.1	Provide 'back-up' staff within the organisation, trained in customer service to ensure that the Customer Services Team is always fully staffed in accordance with daily/seasonal demands.	Head of Housing and Customer Services	We are commencing a trial of this and identifying the training required to support this. Action: To test this approach and train other members of staff to support CST staffing,		QTR 1 2021
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TRAINING FOR ALL STAFF

Recommendation 11:

Provide training for all staff to ensure that they are fully familiar and compliant with appropriate identified values and approaches towards BVT customer service.

11.1	Ensure all new members of staff spend a day shadowing CST.	Head of Housing and Customer Services	All new members of staff within the Community Directorate will have shadowing of CST as part of their induction programme. This will also include other members of staff within CST. We have been unable to implement this since March due to COVID but will resume as and when we are in a position to return to the office more consistently. Action: To reintroduce at the appropriate time.		QTR 2 2021
11.2	Provide all staff members with training on the CRM system to enable them to navigate and exploit the system, followed by ongoing refresher training.	IT	Currently each team is responsible for delivering this training. A previous review in 2020 identified the need to have 'Super Users' within each team. This has not been put in place due to COVID and also significant changes to team structures. This work is being led by the ICT Strategy Group which includes all Heads of Service. Action: Put training in place/ super users.		QTR 2 2021