

Customer Panel Scrutiny Report

The Customer Experience of the Contact Centre

Report compiled by: Cairn Customer Panel
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Date of review:



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The Customer Panel are a group of volunteers who work with Cairn Housing Association to scrutinise the quality of their services and make recommendations for improvement.

1. Introduction

1.1 What are the benefits of scrutiny?

Tenant scrutiny gives the following benefits:

- Continuous monitoring of performance allows the customer and association to improve the services customers receive
- Customers have the opportunity to take part in monitoring the organisation and influencing how services are carried out
- Customers can offer a valuable perspective on the actual experience of customers which can help shape and improve Cairn's services

Tenant scrutiny can bring benefits for all, including:

- Customers – it improves services
- Cairn – it identifies underperforming areas
- Regulator – it demonstrates compliance with regulatory standards
- Partners and stakeholders – it illustrates the benefits of partnership working and continued improvement

1.2 Selecting a service for scrutiny

This topic was selected by the Customer Panel because it was a service area which they felt could benefit from scrutiny.

Current Customer Panel members:

Dawn Beaton (Chair)
Alison Harvey (Vice Chair)
Jo Perrins
Deborah Docherty
David Johnstone
Paul Gartshore
William Callaghan



2. Scope of the Review

This review looks at the customer experience of our contact centre. This included an introduction to the contact centre by the Senior Advisors, shadowing staff while they received calls, a demonstration of the systems they use, reviewing satisfaction survey data and interviews with key members of staff.

3. Scrutiny Process

The scrutiny project followed a pre-agreed programme which consisted of three stages:

- Fact finding and research
- Practical research
- Interviews

Panel members were invited to write mini reports after each stage with their findings. This helped inform the next stage of the project.



4. Customer Panel's Statement

We found the staff from the contact centre very friendly, helpful and keen to improve the service.

We recommend that Cairn continues to develop the roles and responsibilities of the contact centre and the systems they use, so they can provide a better service. For example, creating a workflow on income management and giving them the authority to set up direct debits and give permission for tenants to carry out small improvements to their homes.

The contact centre need much better profiling information and visibility of indicators such as disabilities and communication needs. They also need sufficient time to meet and train as a team, as well as having a thorough and robust induction process in place for new staff.

The Customer Panel look forward to seeing our recommendations put in place and starting work on our next scrutiny project.



5. Findings, Recommendations and Actions

	Finding	Customer Panel Recommendation	Executive Team Action	Implementation Date
Findings on quality of customer service and interactions				
1	Standard of customer service was generally very good across the team with high levels of customer satisfaction reported.		We appreciate the positive feedback. We will continue to develop our service through coaching, training and the development of our systems.	
2	Inconsistencies around standards of customer service. We saw examples of great customer services but in some cases it appears that training has been insufficient for Advisors to respond fully to enquiries		Training to address inconsistencies in customer service will be addressed by our training and induction plans detailed further below.	
3	Not enough staff and too many are part time for there to be consistent levels of customer care.	Consider making one or two members of staff full time. Consider hiring more staff to combat staff shortage.	Unlikely to be implemented in full During the period where the Panel were scrutinising the service the Contact Centre was affected by summer holidays and long-term sickness absence.	

			We will complete a full review of our shifts and staffing, using statistics about call volumes and performance.	By January 2018
4	Staff are not given enough time to train before answering calls. Newer staff are lacking in knowledge and confidence.	A full induction and training session to be given before staff are made to answer calls. Shadowing frontline staff in different offices to be considered as part of training plan.	<p>Agreed The induction process has recently been completely reviewed and replaced. It was successfully implemented with the induction of the most recently recruited Advisor.</p> <p>A programme for shadowing frontline staff will be implemented with one Advisor released every month.</p>	<p>Ongoing</p> <p>From November 2017</p>
5	The contact centre team do not have sufficient time to meet as a team.	The contact centre should meet regularly as a team.	<p>Agreed The contact centre currently have two 15 minute catch up meetings a week and one full team meeting a month. We will consult the team on how we want to organise team meetings in future. Our colleagues in Inverness and Bellshill have been given additional training so they can cover team meetings.</p> <p>In addition, contact centre staff will have a monthly 121 with</p>	By end November 2017

			their line manager and regular call monitoring/observations.	
6	Contact centre staff can not always reach a colleague to accept a customer enquiry.	There needs to be a point of contact at all times for each frontline team. Our expectation as tenants is that we should in almost all cases be able to speak to a relevant member of staff.	<p>Agreed but unlikely to be implemented in full</p> <p>Our aim is to increase the team's responsibilities so they can respond to more enquiries at the first point of contact.</p> <p>Where that is not possible we offer a response within two working days.</p> <p>As we progress with our Digital Services more services will be available and automated online, which will free up more staff time to respond to urgent enquiries.</p> <p>Where an enquiry is of an urgent nature we do make every effort to find an Officer who can respond, however, with the move to more flexible working and home working we can't guarantee a member of staff from each department will be available at all times.</p>	

7	There is a call back system when lines are busy but it appears it is not working.	Review call back system to ensure it works and is appropriate.	Agreed We will test the system and investigate with Netcall.	End of October 2017
8	Hold music is too loud and could do with a refresh.	Change the hold music and turn down the volume.	Agreed We have decreased the volume of the hold music. The team will look for other royalty free music files as a fun team exercise.	Partially complete End of November 2017
Findings on use of technology and systems				
9	Staff diaries are not always kept up to date. Contact centre staff don't always know where people are or whether they're available.	All staff to keep diary up to date. Guidelines to be created for all staff to be aware of what information and level of detail needed for diary entries. Cairn should look at alternative systems for managing diaries.	Agreed The Contact Centre, as a team exercise, will put together a list of '5 quick wins' that if all staff were to do would make a significant difference to the quality of our services. Senior Advisors will contact staff who don't provide sufficient information in their diaries.	End of October
10	Notes on OpenHousing are being written by other colleagues and are not accessible by contact centre staff.	All notes should only be added to CXM or there should be a sync happening between the two systems so that all	Partially agreed Contact Centre staff do have access to the Open Housing system and training will be provided to access diary notes.	By end of November 2017

		information is accessible to contact centre staff.	<p>There are significant costs to syncing information back to Open Housing so it will not be possible to implement that change. However, it may be possible to develop a system that would allow some notes to be synced from Open Housing to CXM. We will investigate and consider for our plan of developments to CXM/59R.</p> <p>The quality of notes may be included in the '5 quick wins' campaign.</p>	By the end of March 2018
11	The contact centre get approximately 135 calls a month from people on the waiting list and they have no access to housing lists to be able to help them.	Give contact centre access to the list and give them training on how waiting lists work and how to give callers appropriate advice and information.	<p>Partially agreed</p> <p>Training to be provided to contact centre team to give them a better understanding of the allocations process.</p> <p>It can be detrimental to customers to tell them where they are on the housing waiting list because the lists change constantly. We believe it would offer a better service to explain to customers about the points system.</p>	By end of December 2017

12	Contact centre staff can not end tenancies. They receive around 30 calls a month about this.	Give contact centre staff authorisation to do this and give them appropriate training for correct procedure to follow.	<p>Partially agreed We have an end of tenancy workflow but tenants are required to give notice in writing (as per tenancy agreement). The existing workflow will be tested and changes if required.</p>	By end of March 2018
13	Once a tenancy has ended staff do not have access to tenancy information. It's no longer available on the CXM.	Make former tenancy information visible on CXM for a period of time after tenancy has ended.	<p>Agreed We made a choice to only transfer current tenants to CXM due to volume of former tenants and the potential for system issues. Nevertheless, the panel have identified an issue and will investigate a change that will mean tenants who have given their four-week notice will stay on the CXM system until they have physically left the property.</p>	By the end of March 2018
14	Contact centre can not set up direct debits. Why are we not accepting money from people who want to pay Cairn their rent?	Allow contact centre to set up direct debits. Work out a level of delegated authority that works for Income Management team.	<p>Agreed Workflow has been scoped but not yet developed. We will submit a change request to Netcall after the next upgrade, with the aim of having the workflow in place by end of December 2017.</p>	By end of December 2017

			CC Team will have the ability to create direct debits where customers are under £200 in arrears, this will be reviewed as part of a bigger review of how we manage income management.	
15	Most of the calls are around income management and there is no workflow.	Create an income management workflow.	Agreed There is an income management workflow. We're reviewing the workflow after the next system upgrade (due November) with Customer Services colleagues so there is an income management general enquiry and an income management payment.	By end of March 2018
16	We are concerned over where people have Power of Attorney and there appears to be a lack of procedure/systems in place to manage this.	Review procedure concerning Power of Attorney and respond with an action plan.	Agreed A flag for Power of Attorney/Guardianship has been requested. A flag would draw attention to notes in an interaction.	End of December 2017
17	Profiling information is not very good. For example, emergency contact information and communication needs.	Staff should be checking when on calls. Cairn also need a better approach to gathering profiling information.	Agreed The Contact Centre workflows prompt Advisors to check contact information. Currently this is only the tenants' contact information and will investigate the need to update emergency contact information (balancing	TBC

			<p>that against the additional call time).</p> <p>We agree that Cairn's approach to customer profiling could be improved. The process for gathering profiling information will have to be reviewed in light of the new GDPR (data protection) legislation is introduced.</p>	
18	<p>Insufficient flags identifying disabilities, communication needs and healthcare issues.</p>	<p>Improved use of flags. There needs to be more information along with the flag. For example, 'communication needs' doesn't tell you enough.</p>	<p>Agreed All users will have access to add flags.</p> <p>We will review available flags and update as required.</p>	<p>End of December 2017</p>
19	<p>The quality of the notes from the contact centre when making a case is not always sufficient.</p>	<p>Guidelines and training to be produced so contact centre staff know the level of detail to be included. A system to be put in place to monitor the quality of the notes.</p>	<p>Agreed This is now part of the induction process and reviewed as part of call monitoring/observations.</p>	<p>Ongoing</p>
20	<p>The quality of the notes from other staff when responding to a case isn't always sufficient. If that tenant phones again the contact centre staff don't always know</p>	<p>Guidelines and training to be produced so other staff know the level of detail to be included. A</p>	<p>Agreed Guidelines to be produced and made available to all staff.</p>	<p>End of October 2017</p>

	what has been discussed. "Called tenant back and spoke to her" isn't sufficient information.	system to be put in place to monitor the quality of the notes.	Encouragement to staff to be included in list of 5 quick wins.	
Findings on the way forward				
21	Contact centre can not give authorisation to tenants wishing to make improvements and alterations to their home. This accounts for approximately 30 calls a month.	Delegated authority to be worked out so that contact centre staff can give authorisation for small improvements.	Agreed The next big systems update will include the capacity for Cairn to build small workflows relatively easily. This will allow us to build workflows for this kind of process.	End of March 2018
22	Contact centre have insufficient information about planned improvement works and the programme.	Contact centre staff to be given appropriate access and training to access PIMSS database.	Agreed Integration with PIMSS is already in place but we need to add relevant and appropriate additional information to the property records and provide training to the team. In the meantime the Investment Team will issue periodic updates about their programme.	End of March 2018
23	Cases run over time. How often are they checked and actioned? Who is monitoring this?	Overdue cases to be monitored regularly. Cairn should consider making this part of its KPI monitoring.	Agreed All officers are sent an email when cases are approaching the deadline. Service managers also receive a notification and have access to	

			<p>a dashboard with information of all cases for their team.</p> <p>We will add an operational KPI to the next financial year.</p>	<p>April 2018</p>
24	The information on the board next to the Contact Centre team is not helpful.	Review the information on the board so that it is useful to the team.	<p>Agreed</p> <p>The next big systems update will include a new system for the softboard which will allow the team to change the content.</p>	<p>By end of February 2017</p>
25	Through interviewing frontline staff there was a desire for more contact between them and the contact centre.	Partnership working to be set up between frontline teams and contact centre.	<p>Agreed</p> <p>See item 4 for CC staff shadowing other teams.</p> <p>A new invite will be issued to teams to visit the CC Team, they are always welcome.</p>	
26	Staff who were interviewed had specific requests for the contact centre to help them with tasks.	An ideas forum to be set up to give staff the opportunity to request help with specific tasks. We appreciate that all requests might not be appropriate, however, it would give a platform to staff for their ideas.	<p>Agreed</p> <p>The Cairn staff intranet is being updated with new forums.</p>	<p>By end of January 2018</p>

6. Next Steps

Item	Timescale
Report issued to Neil Golightly and the Senior Management	4 September 2017
Cairn Connect team consulted on response to recommendations for improvements.	11 September 2017
Chief Executive to issue draft response and action plan to Customer Panel, via Amy Sutherland.	6 October 2017
Customer Panel given an opportunity to review and comment on Cairn's response to the report.	20 October 2017
Communicate report and action plan to staff and tenants: <ul style="list-style-type: none"> • Staff newsletter • Cairn Focus • Website and social media 	From 20 October 2017
Evaluation and review of the action plan outcomes.	By end of March 2018