



Customer Excellence Panel

One Call Review

March 2010



Report by
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Acknowledgements

A special thanks to the Customer Excellence Panel members who took the time to carry out this review.

Caroline King (Communications Manager) and Natalie Rimmer (One Call Manager) provided feedback to the panel and responded to any queries.

The review was facilitated by Nina Peters (Performance and Intelligence Manager), Graham Jones (Business Support Advisor) and Hannah Fitzhenry (Customer Insight Officer).

Purpose

The purpose of this report is to summarise the findings of the Customer Excellence Panel (CEP) review of One Call.

The review was carried out between December 2009 and February 2010.

Background

The Tenant Authority (TSA) expects housing associations to have a clear strategy for involving tenants and residents in influencing and monitoring service delivery.

Tenants should be clear on how they can be involved in managing their homes, and Helena must demonstrate how services have been modified in response to tenant views.

Over recent years there has been increased emphasis on tenant led regulation; ensuring housing associations are accountable to its customers.

“Making services and decisions accountable to, and contestable by, residents, and responding to the resident voice, are vital to achieving... excellence in housing.”

Chartered Institute of Housing, 2008

“We expect all housing associations to clearly show how their services have been commented on and influenced by the people living in their homes...We also expect housing associations to be able to show that responding to residents’ views is something that runs through all their activities as part of their culture and the way they deliver services.”

Housing Corporation, 2007

Helena has already made successful inroads to achieving this through its Customer Excellence and Resident Involvement Strategies, by providing greater opportunities for tenants to influence the decision-making process and shape the services that they receive. The Customer Excellence Panel is just one of a range of initiatives aimed at achieving this.

Introduction

Helena Homes wants to ensure that our customers are at the heart of everything that we do.

The Customer Excellence Strategy aims to ensure we deliver high quality services based on what matters most to tenants. We want to ensure that we continually improve and deliver customer led services.

The Customer Excellence Panel have a key role within the Customer Excellence Strategy in helping to improve customer satisfaction and raise the percentage of very satisfied tenants by 25% over the next 5 years. It will help ensure that tenants play an active role in shaping service delivery and identifying areas for improvement.

About the Customer Excellence Panel (CEP)

The Customer Excellence Panel (CEP) was established to provide an enhanced scrutiny role across the services Helena provides. Scrutiny is an important function, which helps to ensure that our customers receive high quality services that are relevant to their needs and demonstrate value for money. It adds a new dimension to Helena’s decision-making process by examining and questioning performance and decisions made by the organisation from a tenant’s perspective.

Aims of the Panel

The aim of the panel is to help Helena deliver better services by ensuring tenants are able to influence service design and hold Helena to account for performance.

The panel's role is not as a consultation group to advise on policy and procedure, but as a scrutiny panel to challenge the way in which services are provided.

The panel aims to regularly review Helena's performance, actively challenging the way in which we deliver services to assist us in continuous improvement.

The panel will draw on wider sources of information to ensure that they represent the views of the majority of tenants (and residents where applicable). Such information includes customer satisfaction surveys and complaint feedback.

The panel enables tenants to have a greater role in:

- Defining what is important and expressing preference in shaping service delivery, including reviewing and setting service standards
- Monitoring performance and holding Helena to account

In doing this it is hoped that the role of the CEP will help us to increase customer satisfaction with the services Helena provides

Overall the approach will help to further embed a customer focus in the way that Helena behaves, which will lead to better services for customers.

Review Process

The panel has received independent training and support (from the Northern Housing Consortium) in order to build confidence and capacity in their role.

The review entails an overview of service delivery and performance, and questions whether the CEP can further develop a service to improve customer satisfaction and value for money.

To do this the panel is provided with a range of performance information and scrutiny activities to ensure they accurately reflect the customer's experience. The information provided includes:

- Performance data
 - against targets
 - over the past three years (trend analysis)
 - against similar organisations (benchmark information)
- Customer feedback to determine what matters most to tenants
- Complaints information
- Positive feedback and compliments
- Best practice information from other organisations
- Activity Based Costing (ABC) information
- Service Standards
- Findings from Customer Inspector reviews
- One Voice survey findings
- GIS maps to identify geographical trends (where applicable)
- Customer Insight information
- Other information as required

The panel use the stated information to gauge a view of how well a service is performing and ensure that we are working towards meeting tenant priorities and providing value for money. This then enables the panel to recommend service improvements.

If further information is required the panel can request questions to be put to the One Voice tenant panel, or they can request an inspection or a mystery shop by the Customer Inspectors.

As part of the review the panel are also given the opportunity to meet and discuss the service areas performance with the relevant service managers.

This approach helps to ensure that Helena keeps tenants are at the heart of service delivery and that tenant views and opinions are a key consideration in the decision-making process.

One Call – Customer Excellence Panel Review

This is the third service area review undertaken by the panel.

The schedule of reviews was agreed between the Performance and Intelligence Team and the CEP based on the current corporate priorities and aspects that tenants have identified as key drivers of satisfaction. A copy of the review schedule for 2009/10 can be found on Highway within the Customer Excellence Project section.

Aims of the Review

Specifically relating to One Call, the review aimed to :

- Review and scrutinise performance & customer feedback (including complaints)
- Agree Customer Excellence Performance Indicators
- Review current Service Standards
- Recommend areas of improvement and identify actions
- Consider whether the service is providing value for money and delivering excellent services to tenants and residents.

Approach to the Review

The Performance and Intelligence team presented an overview of performance to date drawing on the range of information outlined within the 'Review Process' section.

A number of breakout sessions were held throughout the presentation in order for the panel to discuss their views and opinions, ask questions and challenge performance.

The breakout sessions were structured around:

- What matters most to Helena Tenants?
- Do our Service Standards reflect this?
- How are we performing? (considering cost and value for money)
- Are we monitoring the right things?
- What improvements do tenants want?

Managers were invited to attend the meeting to respond to any questions the panel raised and explain any reasoning behind decisions made.

A wrap up session was held to develop an action plan. The action plan identified the recommended improvements to the One Call service.

Findings

Overall the panel were impressed with the current performance of the One Call service. The panel were happy with the current service standards and were satisfied that they met their expectations.

As with the previous service reviews the panel have agreed to continue to monitor a selection of Key Performance Indicators (KPI's) specifically relating to aspects of the One Call service that are important to tenants. Details of the specific KPI's can be found in the 'Are we monitoring the right things' on page 9 and 10 of this report.

The panel acknowledged that when benchmarked in terms of value for money the service is ranked 64 out of 82 similar organisations. (*Mpathy benchmarking report 2009*)

The following sections outline the findings and actions that have been discussed and agreed as part of the review of One Call.

How are we performing?

The CEP considered the One Call service to be performing at a high standard and that improvements to the current service would be minimal. It was detailed that the service couldn't perform much better than it is currently doing. The One Call satisfaction survey illustrates that the service is performing well with 93% of respondents rating the overall service as 'very or fairly good'.

The Customer Inspectors mystery shop also supports that the service is performing well as satisfaction for was reported as good.

Panel members noted that the length of the call does not highlight performance and considered that an increase in the call length may be the result of a better quality service with the advisor dealing with a number of different issues during the same call.

The panel felt that tighter targets would have an adverse impact on the quality of the service and therefore did not advocate this. Current targets set by Board were considered to be a little high specifically the rise to 98% for calls answered in five rings. Panel members suggested a target for this of 94% or the time taken to answer a call increase to 20 seconds. (This would still compare well with other similar organisations)

Evidence from the current KPI's and satisfaction surveys shows the service to be demonstrating continuous improvement. However the panel considered the current targets to be set too high and as a result One Call are not yet achieving them.

One Call currently benchmark against large numbers of similar organisations and this therefore provides a good comparison of performance.

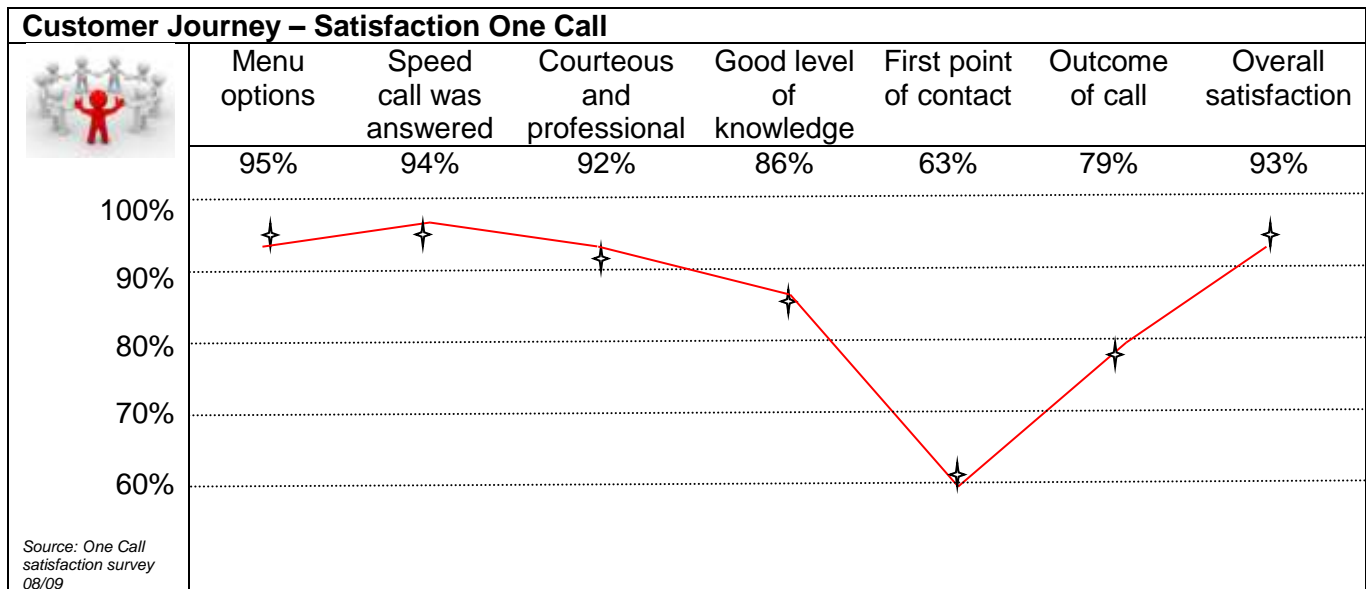
The results of the Mpathy benchmarking exercise highlights that the One Call service is performing at least as well or better than other similar organisations. Overall satisfaction with the service ranks One Call 29th of 61 organisations showing performance to be within the top half.

In comparison to other similar organisations One Call are performing well and are ranked highly for many indicators in the Mpathy report. For example the number of inbound calls is 98% and when benchmarked the service is ranked 7 out of 84 other organisations.

The panel indicated that the performance information illustrates that One Call are performing well.

What matters most to tenants?

The diagram below displays the customer's journey in terms of their satisfaction at each stage of the process. This is from making the call to the completion or resolution of the enquiry.



Key:

— = Customer Satisfaction at different stages of the One Call process

The panel members were impressed with the results of the One Call satisfaction survey 08/09 and identified that overall satisfaction of 93% (very or fairly satisfied) demonstrated a high level of performance.

The Mpathy benchmarking report 2009 highlights that in comparison to other similar organisations One Call is ranked 29 out of 61 for overall satisfaction with the service.

The panel noted that ideally the advisors level of 'courtesy and professionalism' should be at 100%, however considered that 92% displayed high performance.

A good level of knowledge is considered to be important to tenants. One Call's level of knowledge is currently rated at 86%. The panel highlighted that the One Calls knowledge needs to be high for the maximum number of calls to be dealt with at the first point of contact.

Resolution or 'sign off' of a query is considered to be highly important to customers. Customer Inspector feedback highlights that this impacts on overall satisfaction with the One Call service. Panel members therefore considered it to be important to think about calls that are transferred to other departments as this may have an adverse impact on a satisfaction with the service. The panel also considered the One Voice survey to support this and illustrates that satisfaction with the service is lower when a call has been transferred. Independent research carried out by Cogent Research identified that performance is high and that there is limited room for improvement in regards to increasing overall satisfaction.

However the panel are aware that when calculated the impact of this is 1.6, the maximum possible impact is 1.9 highlighting that there is little opportunity for improvement to overall satisfaction.

The panel consider it important that the One Call advisors are providing accurate details to help in the

diagnosis of a repair. Although this point is important to detail it is worth considering that it has been based on personal opinion rather than evidence.

The following points are recommendations from the Customer Inspectors mystery shop of One Call December 2009.

The Customer Inspector's highlighted that the introductory message was too long and that it should be shortened. Although this was not a view held by panel members it was agreed that the recommendation from the Customer Inspectors be considered.

The Customer Inspectors also recommended that both the One Call and Out of Hours advisors should state their name at the end of a call. Feedback highlighted that it is easy to forget the advisors name after detailing an enquiry.

The mystery shop highlighted that emphasis should be given to both the One Call and Out of Hours advisors to talk slowly and clearly as sometimes strong accents are difficult to understand.

The panel were concerned that the Out of Hours service was letting down the overall One Call service.

The results of the Customer Inspectors mystery shop show the satisfaction with the Out of Hours service to be lower than that of the One Call service. Although the panel are aware that the services each have their individual satisfaction surveys they are concerned that the performance with the Out of Hours service will impact on the overall level of satisfaction with One Call.

The Customer Inspector mystery shop highlighted that there was a difference in the level of knowledge between the One Call and Out of Hours advisors. The panel suggested that the Out of Hours advisors knowledge of Helena's services should be improved to lead towards a more effective service for customers.

The Customer Inspectors mystery shop of One Call detailed that occasionally the One Call and Out of Hours advisors were not always 'polite and helpful', panel members suggested that this should always be carried out as analysis illustrates that this impacts on a customers overall satisfaction. Panel members felt that advisors should always be 'helpful and polite' in the way they respond to calls despite their level of knowledge and ability to resolve the query.

Based on evidence the panel agreed that the One Call service is currently performing highly. The results of the Customer Inspector mystery shop suggests that the performance of the Out of Hours service is lower than One Call performance. The panel therefore considered it important to gather further feedback around the Out of Hours service in preparation for the next review of One Call. The panel considered a mystery shop of the Out of Hours service to be a beneficial method of ascertaining customer feedback.

Initially panel members were keen for the Out of Hours service to be distinguished from the One Call service. After further discussion the panel considered a 'seamless' approach to be more effective and that available services should be communicated to the wider tenant base.

The panel were also keen to conduct comparisons between the service's and were in support of two separate satisfaction surveys so any required improvements can be identified.

The panel were happy that their was enough information to identify 'What matters most to tenants' and therefore no requests were made for additional research including the use of the One Voice consultation panel.

Do our service standards reflect what matters most to tenants?

The panel considered the current service standards to meet their expectations. It was specifically noted that the standard of “If we cannot resolve your enquiry straight away, we will ring you back the same day” is a good response time.

The panel considered the One Call satisfaction survey 08/09 results show a high level of satisfaction with the service therefore service standards are effective.

The speed at which a call is answered is not as important to the customer, however they do not want to hold for an excessive length of time. It was suggested by panel members that customer’s would be prepared to wait if they knew their query was going to be resolved.

The actual number of calls answered in five rings is currently very high at 94%. The Customer Inspector findings show that the speed at which a call is answered does not impact on overall satisfaction. Benchmarking information also shows that there is no correlation between the speed at which a call is answered and the overall level of satisfaction.

The panel considered the measurement of the time taken to answer a call is not necessarily the most important aspect to tenants. As long as this time is not excessive it would have little impact on satisfaction. The service standard of “we will answer your call in five rings” has high performance and is continuing to show an upward trend.

The length of a call was considered by the panel members as a service standard. However it was acknowledged that this can vary greatly depending on the type of query. It was agreed that the length of a call does not necessarily highlight how well we are performing. Benchmarking shows that there is no correlation between the length of call and overall satisfaction. Resulting in the panel members agreeing that no annual target is required.

An increase in call length may be due to a better quality service and a more thorough approach, with the advisor taking the opportunity to deal with a number of unrelated issues.

Are we monitoring the right things?

The panel recognised the importance of measuring quantitative information to evidence compliance with Service Standards and Performance Indicators.

The panel are continuing to develop their own suite of Customer Excellence Key Performance Indicators (KPI’s). Whilst the panel recognise the need to monitor regulatory requirements and assess financial viability, they would also like to monitor issues that are important to tenants which will help us to ensure we are working towards improving services for tenants and in turn increase our percentage of very satisfied.

The panel were asked to consider what performance information they would like to monitor in relation to One Call.

The panel were not initially interested in the percentage of lost calls and considered that it can be influenced by the person making the call. After further discussion the panel found it to be significant as it highlights whether a customer is prepared to continue to hold or hang up. As a result the panel has requested more information in relation to the percentage of lost calls which has been incorporated into the action plan. The panel will use the information to dictate whether they see it as an element that is important to monitor as part of their suite of KPI’s.

The service standard of “If we cannot resolve your enquiry straight away, we will ring you back the

same day” is not currently reported, although this is important to note the panel are more concerned with the resolution of a query.

It was noted by the panel that the current percentage of calls answered in five rings was good at 93%. The target set by board of 98% is considered to be high, a target of 94% was therefore suggested. The panel considered this to be achievable and allows the service area to focus more on the quality of the service rather than the speed.

The review of Repairs and Maintenance in August 2009 highlighted that the panel are keen that the One Call advisors are able to use their discretion when allocating repairs to disable and vulnerable tenants. A split of sixty percent routine and forty percent emergency and urgent was suggested by the panel.

The panel suggested that a target should be met before it is raised.

The following Performance Indicators will be reported to the panel as part of the Customer Excellence suite of KPI's:

- % of calls answered in five rings
- % lost calls (*to be confirmed*)
- One Call satisfaction
- Out of Hours satisfaction

Panel Recommendations

In order to increase the percentage of tenants stating that they are satisfied with this service the panel recommends that Helena:

- Monitor the Out of Hours service making use of the satisfaction surveys and mystery shops
- Improve the Out of Hours advisors level of knowledge with Helena services
- Decrease the target for the percentage of calls answered in five rings to 94% or increase the time to answer the call in 20 seconds
- Publicise the service
- Once in place make use of the CRM system to monitor calls that are transferred to other departments
- Advisors state their name at the end of a call
- The greeting message shortened
- Improve the volume and sound quality

Next steps

An action plan in response to the panel findings has been agreed.

The outcomes will be presented to the Customer Excellence Strategy Group and Board.

The Service Standards and Customer Excellence KPI's identified as part of this review will be publicised to tenants via headlines and leaflets and other literature amended accordingly.

Customer Inspector Recommendations

Panel members considered the Inspectors recommendations as part of their review of the One Call service. Recommendations have been incorporated into the CEP's full action plan for the One Call service area. The detailed recommendations are displayed in the table below.

The Customer Inspectors have given their own suggestions as to how the One Call service can be improved. This information was gathered at a breakout session during a Customer Inspector meeting. The Customer Inspectors were asked collectively to recommend ideas to improve the One Call service.

The Inspectors found the introductory message for One Call too long and suggested that this be shorter.

It was suggested by the Inspectors that the One Call advisors state their name at the end of the call rather than at the beginning. The advisors speak so quickly that sometimes the name is missed.

The Inspectors found strong accents difficult to understand, they suggested that emphasis should be given on talking slowly and clearly.

Some Inspectors had difficulty with the sound of the call, this was in relation to the volume. A suggestion to improve this to ask the caller if the sound level is at a good level or does it need turning up or down. It was also noted that the sound level of the Out of Hours service was lower than that of the One Call service.

The Inspectors made a number of recommendations about the Out of Hours service, this was mainly in relation to their lack of knowledge on the subject matter they were ringing about. On a number of occasions the inspectors were referred to One Call. It was suggested that the Out of Hours service improve their knowledge of Helena's services and are given access to more details. The Inspectors were unclear if the Out of Hours service was for emergency only and for any other enquires they should contact One Call during their opening times.

One Inspector rang for an application form, this is a different contact number than the One Call number. It was highlighted that the message on the answering machine service was confusing and it was unclear what would happen as a result of the phone call. The Inspector recommended that the message clearly states that a member of the team will return your call.

Overall the consensus with the Inspectors is that all advisors that were contacted dealt with queries in a professional polite manner. There are therefore no recommendations for improvements for this aspect of the service.

The full Customer Inspector report is available to view on the Customer Excellence section of Helena Highway

Action Plan – One Call CEP Review

Recommendation	Action	Reason	Service Area Response	Who	When	Progress update
'Concerns with the Out of Hours service'	Commission the Customer Inspectors to conduct a mystery shop solely on the Out of Hours service	The panel found that satisfaction with the Out of Hours service was lower than that of One Call and therefore requested further details of this.	A mystery shop of the Out of Hours service will be incorporated into the future Customer Inspectors timetable.	PIT	April 2010	April 2010
	Gather separate customer feedback on the One Call and Out of Hours services.		The One Call and Out of Hours surveys will be reviewed to allow for comparisons between the services to be made.	PIT	April 2010	April 2010
	The Out of Hours advisors state they are, LDL providing a service on behalf of Helena Partnerships.		The service provided by LDL is a continuation of the service rather than an emergency service. LDL have access to the knowledge maps, can take receipt of payments and can resolve customer enquiries at the first point of contact.	One Call	Completed	Completed
The Out of Hours level of knowledge is lower than One Call	Improve the Out of Hours knowledge of Helena's services	The Customer Inspector mystery shop highlighted that there was a difference in knowledge between the One Call and Out of Hours advisors.	The service provided by LDL is a new service and has only been in place since September 09. The team have access to the Helena 'knowledge maps'. The One Call Team Leader and a selection of advisors are providing personalised training for LDL members of staff. LDL advisors have also be welcomed to shadow One Call to gain a further knowledge of Helena services and culture in regards to One Call. This training will be reviewed on a monthly basis until performance has improved.	One Call	Ongoing	29/04/2010

Recommendation	Action	Reason	Service Area Response	Who	When	Progress update
Seamless service between One Call and the Out of Hours service	Publicise the service by including an article in a future Headlines	The One Call and Out of Hours service should be seamless and customers should be aware that the same level of service is provided.	One Call will liaise with the Communications team to produce an article in a future copy of Helena Headlines.	One Call/ Comms.	June 2009	29/03/10
'Some accents are difficult to understand'	Emphasis given to both One Call and Out of Hours advisors to talk slowly and clearly.	This recommendation was made by the Customer Inspector, they reported that one a number of instances it was difficult to understand the Out of Hours advisors due to strong accents.	The quality of communication style is assessed on a monthly basis. All incoming calls are recorded, three calls per individual per month are assessed and scored with feedback discussed for evidenced improvements. Soon to be increased to five calls	One Call	Ongoing	29/03/10

Recommendation	Action	Reason	Service Area Response	Who	When	Progress update
'Review the CEP's Customer Excellence KPI's'	Include 'the number of calls answered in 15 seconds'	The panel considered that some of the PI's were more useful than others.	The suite of Customer Excellence KPI's will be amended accordingly in time for Quarter 3 Customer Excellence KPI's.	PIT	Quarter 3	Quarter 3
	Further information required for the % of lost calls including: - Out of Hours % of lost calls -Number of rings before a call is lost -Times when % of lost calls is highest		The information around the % of lost calls will be provided to the CEP so they can identify whether this KPI should be reported quarterly as part of their suite of KPI's	PIT	Quarter 3	Quarter 3
'Target set for calls answered in 15 seconds is overambitious'	Set the target at 94% or increase time to answer to 20 seconds.	The panel felt that a target of 98% was unachievable given that current performance is at 93%. The current target should be met before the target is raised as the panel were concerned that such a high target would have an adverse impact on the overall quality of the service.	Target to be reviewed as part of the annual target setting process. This will be agreed by Board.	Colin Ward	April 2010	29/03/10

Recommendation	Action	Reason	Service Area Response	Who	When	Progress update
'Review call 'sign off''	When in place make use of the CRM system to identify how effective all Helena departments are at returning calls.	The panel were concerned that calls were being completed before the query has been resolved once it has been passed to another department. This was identified as having an impact on satisfaction. (Customer Inspector cross tab analysis of overall satisfaction)	<p>Clarification is needed on what is meant by 'signed off'.</p> <p>One Call is not intended to be a one stop shop and therefore relies upon availability of other service areas within Helena. One Call members will aim to answer as many queries at the first point of contact. However this will not be possible within all transactions. We recognise the need to ensure smooth transition when other departments pick up a query.</p> <p>The CRM system will enable CEP to measure/monitor how well staff in other departments are at returning calls received via One Call</p>	One Call	n/a	22/02/10
Communicate with the customer when a call is transferred	When a call is transferred state which department the call is being taken by	Confusion over who is responsible for the resolution of a particular query.	As part of the call quality assessments, all calls which are transferred or processed through the handoff procedure are scored and assessed to ensure comprehensive detail on who is being contacted and their role within Helena is provided within every call transaction. All Advisors within One Call are trained to fully explain process and procedure to ensure the customer is informed of what will happen next in terms of resolving their enquiry.	One Call	n/a	29/03/10

Recommendation	Action	Reason	Service Area Response	Who	When	Progress update
'Advisors give their name at the end of a call'	The One Call and Out of Hours advisors to state their name at the end of a call.	This is a recommendation from the Customer Inspectors mystery shop, it was highlighted that it was easy to forget during the discussion of a query.	Instructions have been given to commence training in this area. Appropriate communications will be made to LDL. Training has been given to all members of One Call and instructions made to the team at LDL. The success of this communication change will be assessed on a monthly basis within the call recording assessments.	One Call	01/03/10	22/02/10
'Shorten One Call greeting message'	Shorten the One Call greeting message.	This action is also recommended from the Customer Inspectors, they noted that the greeting message was too long.	The call router has now been shortened by removing the service time and the busy time information. The service user is now welcomed and put straight through to the list of menu options.	One Call	Completed	Completed
'Improve the quality of the sound'	The volume and quality of the sound should be improved.	The Customer Inspectors identified some problems with the quality of the sound.	There are call quality issues with regards to volume, echoing and buzzing on the One Call telephony lines. The issues is being investigated and monitored by lakeside technologies. LDL to be informed of concerns for investigations to commence.	One Call One Call	Ongoing 01/03/10	22/02/10 22/02/10

Recommendation	Action	Reason	Service Area Response	Who	When	Progress update
<p>'Service couldn't perform much better than they are currently doing'</p>	<p>The panel would like the One Call service to aim at decreasing the percentage of customer's who are dissatisfied</p>	<p>The panel highlight that One Call performance is high, they suggest there is an aim to decrease the number of dissatisfied customers.</p>	<p>The One Call satisfaction survey feedback will be reported to the CEP on a quarterly basis.</p>	<p>One Call</p>	<p>Quarterly</p>	<p>22/02/10</p>
	<p>Analysis of complaints reported on a regular basis</p>		<p>CEP members will be updated on complaints.</p>	<p>PIT</p>	<p>Quarter 4</p>	<p>Quarter 4</p>