

**Title: Telephone Contact Team Study**

**Report of: Independent Review Group (IRG)**

**INTRODUCTION**

In the original brief, the group were issued with the following points, that we termed Key-Lines of Enquiry (KLOE)

* To establish the flow of telephone contact into the organisation with regard to issue, time, average duration etc.
* To analyse the issues which generate the enquiry i.e. service request, information request, repeat request, response to service failure etc.
* To establish the performance and quality of the service and benchmark within and externally of the sector
* Establish the direct costs of service delivery and benchmark these internally and externally.
* Clarify the relationship between repairs, housing management and corporate contact and how these relate to direct service delivery, and to related functions within the organisations e.g. between repair reporting and repair planning.
* To reach a preferred future options for service delivery

The group took these KLOE and investigated the Contact Team (CT) and its functions using a variety of methods. The Customer and CT questionnaires were designed and developed by IRG members.

These were:

* Customer Questionnaires – a sample of 121 customers from differing areas of housing and locations within Hartlepool.
* Site visits to all CT offices, interviewing staff plus periods of shadowing the CT daily functions.
* Contact Team Questionnaires.
* Study of statistical evidence.

Resulting from these methods of investigation, including the described specific evidence that supports the recommendation, the group determined a number of recommendations. We ask the Board to consider these recommendations in respect of, the impact to the customers and employees of the Company, should they not adopt the recommendations.

The conclusion section to this report highlights the areas where, because of time constraint, the IRG were not able to pursue the investigation.

In addition to this report there is included as an Appendix, the following documents:

KLOE Working document indicating the processes applied, displaying the matrix employed to capture evidence and information throughout this first study.

Risk Assessment document indicating the results of a risk assessment undertaken as a consequence of the site visits to the CT locations, and information garnered from staff and customer questionnaires, designed by IRG members.

Other working documents are available.

IRG Statement

Current CT staff are highly motivated, they have an excellent knowledge base and are a significant asset to the company. Currently, calls are answered in an acceptable timely fashion.

Site visits revealed that the CT demonstrated their commitment to assisting and helping customers pursue and resolve their issues. The group found that CT reception areas were focussed towards the spirit of ‘openness’ and ‘welcome’ for customers.

RECOMMENDATIONS:

Phone Contact into the Organisation

Recommendation 1:

Based on evidence from the Customer Questionnaire and site visits, the IRG recommend a move to a ‘customer’ single one number ‘only’ policy for telephone contact be adopted, that it be a 0300 number (similar to Tristar, free for land lines – cheapest for mobile phones).

*Action 1.1:* A ‘customer’ single one number ‘only’ policy for telephone contact be adopted.

All ‘general’ company documentation, leaflets and advertising to adhere to a single contact number policy. It is acknowledged the continued use of direct line numbers for individuals/departments is beneficial for customers and staff.

*Action 1.2:* All ‘general’ company documentation, leaflets and advertising to adhere to a single contact number policy. Departments and individuals continue to use direct line numbers where applicable.

Telephone ‘Menu’ choices not to be increased (currently 5) and to be reviewed to reduce the number of choices. The verbal introduction to include a statement to offer ‘confused’ callers the option of holding, to speak to a CT member e.g. “if none of the previous choices apply, please hold for a customer service operator to answer your call”).

*Action 1.3:* No increase in telephone ‘Menu’ choices with a review to reduce the current choices and include an option for confused callers (as above).

Specific Evidence identified that support the recommendations:

The customer questionnaire independently sampled 121 customers, evidence indicated that a variety of numbers were being used by customers. It was evident that confusion exists in customers.

Site visits revealed ‘general’ company documents displayed several contact numbers, including internal extension numbers; as a consequence customers are directed inappropriately.

Study of statistical evidence, provided by support staff.

Impact to the Customer:

Customer confusion will continue, given that a variety of telephone numbers to contact Housing Hartlepool persists on ‘general’ company documentation, leaflets and advertising etc.

Customers will continue to be subjected to delays if directed inappropriately due to a variety of contact numbers displayed on ‘general’ company documentation, leaflets and advertising etc.

The costs of using the 0800 repairs number will remain excessive for mobile phone users and the company will be required to inform callers that a cost applies to mobile phone users.

Recommendation 2:

A Phone System review, evidenced from the customer questionnaires, statistical data and site visits. This review to include: reappraisal of current capture of data for statistical reporting and Key Performance Indicator (KPI) capture. Future data to indicate any cleansing or adjustment of the figures.

*Action 2.1:* Review and reappraisal of current capture of data for statistical reporting and Key Performance Indicator (KPI) capture. Future data to indicate any cleansing or adjustment of the figures.

The capture of the call ‘context’ from questionnaires is imperative to ensure improved statistical evaluation and recognition of customer concerns.

*Action 2.2:* Capture and evaluation of call ‘context’ from all customer and staff questionnaires be included in all statistical analysis.

Customer involvement in the development, design and content of all Company generated customer and staff questionnaires, to enhance future information gathering techniques.

*Action 2.3:* Inclusion of customers in the development, design and content of all Company generated customer and staff questionnaires.

Specific Evidence identified that support the recommendations:

From the 121 independently sampled customer questionnaires it was possible to acquire the context of the customer calls to the CT enabling qualitative and quantitative data collection.

A review of the qualitative and quantitative data from the Customer Questionnaires revealed a number of findings: unresolved complaints, reason/context of the call etc. plus errors in statistical conclusions when compared to existing data.

A comparison of the telephone call data (06/2010 – 06/2011) indicated an increase in ‘abandoned calls’ and ‘no agent available’ calls for 2011. Significant is the ‘no agent available’ figures (82 calls for 06/2010 against 207 calls for 06/2011).

Data also indicated increased levels of calls going unanswered during lunchtime periods, ranging from 10.2% (21 calls) to 19% (43 calls).

Customer questionnaire context comments indicated increases in complaints regarding the promptness of the enquiry being resolved and issues regarding the quality of the service.

* Promptness complaints 6 (5%) of 121 producing a potential of above 350 customers over a housing stock of 7000.
* Quality complaints 13 (10.74%) of 121 producing a potential in excess of 750 customers over a housing stock of 7000.

Site visits disclosed inaccuracies in call statistics in that mobile calls are currently recorded twice due to the adopted method of call handling, thus distorting total call figures etc.At the time of writing the team were unable to clarify whether the official statistics had been adjusted for this error prior to circulation.

Impact to the Customer:

The ‘context’ of the customer contact will continue to be unrecorded and ‘lost’ in statistical Company evaluations affecting customers.

Data captured by the current telephone system and company questionnaires may be distorted, producing flawed and misleading information/reports that influence ‘decision making judgments’ affecting management decisions concerning customers.

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Working Practices

Recommendation 3:

A review of working practices and procedures dealing with;

* Customer complaints,
* Customer confidentiality issues,
* Interdepartmental communications, including feedback to CT and Customers.
* Upgrade Job description to recognise the high degree of autonomy/empowerment of CT staff and elevate the role within the Company to fully recognise the importance of the function they accomplish.
* Prioritise key tasks e.g. personal customer visits, phone contact, over internal department ‘administration’ duties etc.

Consider as urgent priorities; customer complaints, interdepartmental communications and elevating the roll of CT staff within the Company

***Action 3.1:*** Review of working practices and procedures of CT duties to cover complaint handling and confidentiality issues.

***Action 3.2:*** A specific review of interdepartmental communications, including feedback to CT and Customers

***Action 3.3:*** Upgrade and elevate the role of CT staff within the company.

***Action 3.4:*** Prioritisation of CT key tasks.

As suggestions:

* Staff Questionnaires indicated the Contact Team require time allocation for Training, Team Meetings, and Personal Confidence/Team Building exercises.
* Offset staffing costs by recharging internal departments for the diverse administration tasks that the CT complete. (Improved IT communication (database) software will eradicate the administration tasks.)
* Consideration of customer reception desk work areas.(Space)
* As per Recommendation 2, relating to data capture.

***Action: 3.5:*** Provision of training, team meetings and confidence,

team building exercises.

***Action: 3.6:*** Re-charge internal departments for the administration

 tasks undertaken by CT team.

***Action: 3.7:*** Increase working space areas at reception desks

(Wynyard Road and West View sites).

***Action: 3.8:*** Data capture as per Recommendation 2.

Specific Evidence identified that support the recommendations:

Customer complaints are ‘soft handled’, an attempt is made to resolve the customer’s issue and an apology is given. No record of the complaint is logged in the majority of cases. This practice produces a false ‘total’ of the complaints received figures for the company.

That all CT staff have undertaken some training in confidentiality, the working environment is not conducive to enable the staff achieve an acceptable degree of confidentiality. The reception desk work area space constraints provide little or no privacy or confidentiality as visiting customers are able to overhear specific conversation details of customers verbal requests and telephone conversations at the ‘open’ office reception counter desk.

Site visits confirmed ‘part-completed/completed and detailed’ customer records (housing applications, housing benefit and other information) were in open view on desks and work areas. These administration tasks (inputting customer data onto the system) from internal departments are in addition to normal CT duties and are at times prioritised, taking precedent over all CT duties. CT staff at times check out of the phone system ‘loop’ in order to complete administration duties.

Customer calls routed to staff in differing internal departments for resolution of the query often fail, (up to 90% is not unusual) initiating the CT to send an e-mail communication to the ‘non responder’ requesting they contact the customer to resolve the issue. Invariably the messages go astray, or are ignored, leaving the customer’s query unresolved. The subsequent delay creates customer annoyance and frustration at having to re-contact the CT on same issue, at a later date. Feedback to update the CT is virtually non-existent.

Analysis of the Staff Questionnaires provided evidence of a perceived stigma, of the CT member role being the lowest step on the Company career ladder.

1. Impact to the Customer:
	* 1. Customer complaints will continue not be logged and fully recorded.
		2.
		3. The confidentiality and security of customer personal details and records remain ‘at risk’, as they continue to be voiced and/or handled in ‘open’ reception areas.
		4. Customers will continue to have their calls not being resolved due to staff in differing departments being un-contactable/unavailable to CT staff.
		5. Administration ‘duties’ from internal departments will continue to cause delays in addressing customer issues and ‘pressurise’ CT staff.
		6. Flawed and misleading information/reports for management decision making will continue.

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**Computer System**

1. **Recommendation 4:**

A phased Computer Systems Review with regard to the benefits of bespoke CRM, ODBC/RDBM computer systems linking all internal department functions to identify and resolve system problems. (e.g. call waiting issues, feedback issues, bespoke reports, information drill down facilities etc.) A system review will ultimately increase staff efficiency and customer satisfaction.

1. Review of working practices (see Recommendation 3)
2. The upgrading of system servers to cope efficiently, increase (speed-up) the processing ability and robustness of the Company computer system, which will produce a positive effect and efficiencies across the whole computer system.

***Action 4.1:*** A phased Computer Systems Review with regard to the

benefits of bespoke CRM, ODBC/RDBM computer systems linking all internal department functions.

***Action 4.2:*** A review of working practices (see Recommendation 3).

***Action 4.3:*** Phased upgrading of system servers.

As suggestions:

Consider the Font sizing within applications in use by the CT, as they use computers constantly throughout the day

Plan the activities of users at work that their daily work on VDU equipment is periodically interrupted by such breaks or changes of activity, to reduce their workload at that equipment.

Apply HSE guidance of ‘timely breaks’ for employees working with VDU’s. (e.g. a 5-10 minute break after 50-60 minutes continuous screen and/or keyboard use)

Upgrade the VDU size to enable selected open databases and programs to be displayed within the screen area.

***Action 4.4:*** Increase font size within CT applications.

***Action 4.5:*** Plan work activities to provide a variation of work tasks.

***Action 4.6:*** Apply HSE guidance of ‘timely breaks’ for employees

working with VDU’s.

***Action 4.7:*** Upgrade the VDU size

1. Specific Evidence identified that supports the recommendations:

Site visits provided the opportunity to observe the CT working practices. To complete their tasks CT members required six various computer applications to be open simultaneously, this enables each operator to complete their role appropriately, on a Windows based desktop.

The repairs program operated extremely slowly causing delays in booking a repair appointment, the program also had an apparent malfunction that required the operator to continually refresh the screen, causing delay and affecting customer call time.

The system slowed considerably during lunchtime hours due to the policy of allowing employees access the internet in their ‘own time’ at their desks

Building Inspector appointment calls are processed using an Excel Spreadsheet (renowned for instability when used by various users) and CT members are frequently locked out of booking an inspector appointment due to the spreadsheet being used by another user. This results in a phone call identifying the user viewing the spreadsheet and requesting that they close down the ‘diary’, to enable the CT member access and make the inspection booking and thus complete the call with the customer.

Due to the number of applications ‘open’ and due to the size of the VDU screen, the font size utilized by CT members was small, making it uncomfortable to view and not compliable with HSE recommendations.

Impact to the Customer:

1. Customers will continue to experience ‘poor service’ and extended phone contact due to the sluggishness of the current ‘inherited’ computer systems and applications.
2. CT members become frustrated and disillusioned due to the lethargy of the system preventing efficient handling of customer issues.
3. **Health, Safety and Security**
4. **Recommendation 5:**

* + 1. A review of ‘Working’ practices within CT at all sites. (See Recommendation 3 above)

*Action 5.1:* A review of ‘Working’ practices within CT at all sites, as

per Recommendation 3.1)

A review of current ‘Health & Safety’ practices within the CT at all sites

*Action 5.2:* A review of the ‘implementation’ of ‘Health & Safety’

practices within CT at all sites.

* + 1. A review of security and confidential measures currently employed within the CT at all sites: affecting staff members, customers, customer documentation, plus the receiving of cash ‘rent’ payments, and the receiving and issuing of property keys.

*Action 5.3:* A ‘comprehensive’ review of security and confidentially

 measures currently employed within the CT at all sites.

As suggestions:

* Office layout/design is reviewed, with high consideration given to adequate work area/reception counter workspace to provide CT staff a working facility suitable for their daily tasks.
* Specific risk assessments to be undertaken at each site, regarding Customer and CT staff security and safety, addressing argumentative or aggressive behaviour situations arising in reception areas.
* Review of office security procedures within public CT areas.

***Action 5.4:*** Review of office layout/design to provide adequate work

area/reception counter workspace.

***Action 5.5:*** Specific risk assessment regarding Customer and CT staff security and safety covering aggressive behaviour.

***Action 5.6:*** Review of office security procedures within public CT

Areas.

1. Specific Evidence identified that supports the recommendation:

Site visits identified a number of issues relating to Health and Safety. summarised here, they are listed in the appendix “Risk Assessment” attached to this report:

* CT members taking breaks at their desks.
* Monitor screens are very small given that the CT work with at least six applications opened on their desktop.
* No security screening in place for CT working on Reception.
* Customers use reception counters to pay rents in cash.
* Property keys are received and issued.

Front office reception counter workspace is cramped and restrictive at two CT locations, (Wynyard Road & West View). Desktop working areas are exceptionally limiting for documenting customer details and completing forms etc. especially when two members of staff are required to work in that area answering customer reception desk enquiries.

Site visits confirmed that security personnel are not on site, (Wynyard Road & West View), but contactable via a panic button linked to the Greenbank office. The implication being, CT staff would have to attempt to contain a confrontational situation (depending on site location) for up to several minutes without help being at hand.

There are no specific warning codes to alert other members of staff present of a threat condition, for them to assist or call assistance.

The applied ‘minimum’ standards of Health & Safety and Confidentiality in the handling of ‘confidential’ customer documents witnessed on site visits are not acceptable.

Study of statistical evidence, provided by support staff.

1. Impact to the Customer:

Customers and CT staff could find themselves involved in a conflict situation, with assistance not being readily at hand.

Customer telephone conversations will continue to be overheard by other customers visiting the reception area.

Confidential customer information will continue to be processed in open view of other customers.

Customer information will continue to be mislaid or lost.

Customers and CT staff will remain at risk in threatening and aggressive behaviour situations.

**Conclusions**

The IRG considers that the scrutiny of the CT was comprehensive, as shown in the recommendations in this report. Time constraints and other factors prevented the group undertaking further areas of scrutiny associated to the CT study.

Listed below are points of consideration to be included within a wider review that may result from this report:

* + Consideration of the Housing Hartlepool out-of-hours team. How it functions, in particular identifying the differences in approach that may affect customers.
	+ Consideration of how Tristar operates its contact with customers and how its operation differs to that provided by Housing Hartlepool. This would provide a contrast for the reader.
	+ Consideration of the ‘bigger picture’ given that Housing Hartlepool and Tristar are under the Vela brand.
	+ Consideration of how other Housing associations work, with regard to Customer Contact.

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The IRG requests the Board consider the report Recommendations and provide a response to the group of the measures Housing Hartlepool will consider as a consequence of this report.

Appendix

 KLOE Working document

 Risk Assessment document