

# National Scrutiny Group Report

Customer Experience Committee



REPORT	
<b>Meeting Date:</b>	
<b>Report Title:</b>	Customer Care Checks Scrutiny
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For Decision <input type="checkbox"/> Debate <input checked="" type="checkbox"/> Information <input type="checkbox"/>	
<b>Summary:</b>	An investigation into the ways in which customer care checks are currently being carried out and to evaluate their usefulness.
<b>Appendices Attached:</b>	<ol style="list-style-type: none"> <li>1. Customer Care Checks Survey (February 2019)</li> <li>2. Customer Care Checks Survey (March 2022)</li> <li>3. Customer Care Checks Data Analysis</li> <li>4. Customer Partner Time &amp; Motion Study</li> <li>5. Audit of Customer Care Checks: Summary &amp; Recommendations</li> <li>6. Customer Care Check Call Card</li> </ol>

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# 1. Background

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In 2019 it was decided to change tenancy checks from being an audit style exercise, to a more comprehensive visit carried out face-to-face on an annual basis by Customer Partners. Customer care checks were introduced in July 2019; however, less than twelve months later, the country went into lockdown. All Accent staff were compelled to work from home and face-to-face contact with customers was heavily restricted.

The physical, emotional, and financial health of many customers suffered as a result of the pandemic. The practicalities of day-to-day life suddenly became much more complicated.

For these reasons, customer care checks could not be carried out in the way that was originally envisaged and the scope of the calls became much broader.

This led to inconsistencies in terms of how customer care checks and their outcomes were recorded. Customers have since reported varying experiences with customer care checks.

The purpose of this scrutiny is to assess how customer care checks are currently being carried out and to evaluate their usefulness.

## 2. Methodology & Evidence Gathering

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The NSG examined evidence from a range of sources to arrive at their conclusions.

1. Interviews were conducted with several members of staff across the organisation, and from a wide range of areas including:
  - Rob Mills - Customer Experience Director (South)
  - Paula Wilson – Director of Customer Contact
  - Serria Ashraf - Service Operations Manager (Contact Centre)
  - Customer Partners – Nine staff interviewed across all regions
  - Jeannie Gee – Independent Living Coordinator (Yorkshire)
  - Phoebe Rodgers – Independent Living Coordinator (East)
2. Existing information was reviewed:
  - Customer Care Checks Survey, February 2019 – A survey aimed at customers who had not had any engagement with Accent in 12 months. The aim of this survey was to find out what should be covered as part of the proposed customer care check, and whether different groups of customers had different priorities.
  - Customer Care Checks Policy, January 2020
  - Customer Care Checks Procedure, February 2020
  - Role of the Customer Partner (Time & Motion Study), December 2021
3. A survey was carried out amongst members of the Accent 1000, together with a representative sample of customers from the wider customer population, to gather their experiences of customer care checks.
4. Analysis of data pertaining to the status of customer care checks, as at 8 February 2022.

## 3. Findings

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### 3.1 Interviews

The interviews with **Customer Partners** showed that, across the country, this role carries a high workload with many priorities. Trying to make contact to arrange and then carry out a customer care check is very time-consuming and does not always yield positive engagement.

Some customers choose not to answer phone calls from unfamiliar numbers and do not welcome unannounced visits. Travelling to carry out customer care checks is also time-consuming and expensive, and it is rarely possible to do several checks when visiting a scheme as they are reliant on customer availability.

There is also currently no way to record that a customer has refused a check, so these continue to show as outstanding.

It was suggested that customers are not aware of customer care checks, as when these were introduced they were not heavily publicised; so receiving a call to carry out a check sometimes comes as a surprise to customers. Some respond with suspicion or resistance.

Customer Partners felt that as other areas of the business, such as the Contact Centre, had much more frequent inbound contact with customers, it would be opportune for them to play a role in carrying out and recording checks.

When contractors attend to carry out repairs or to carry out annual gas safety checks, they could also check that homes are in good condition.

In addition, it was also felt that certain groups (e.g. vulnerable customers and customers who have not had any type of contact in a long time) could benefit more from customer care checks and, as such, should take priority.

**Independent Living Coordinators** reported a more positive experience with carrying the checks out and much less difficulty fitting them into their role as they complement existing 'wellbeing plans', although they found leaseholders less willing to engage than those renting.

The **Contact Centre** interviews showed that Contact Centre staff were able to help with customer care checks in the first lockdown due to a reduction in the number of inbound calls at that time however, now that normal service has resumed, they are busy, especially with calls about repairs and maintenance.

It was suggested that once the backlog of repairs and maintenance queries and complaints, exacerbated by the lockdowns, has been cleared that the Contact Centre may be able to play a greater role in supporting customer care checks.

Contact Centre staff confirmed they are trained to pick up on safeguarding concerns that become evident during calls, and they do check on customer welfare, but these conversations are not recorded as customer care checks. Also, a phone call does not give the full picture.

**Homeowners** are not eligible for customer care checks as they are served by a separate directorate but it was acknowledged that in some cases it would benefit them to be included, especially homeowners on schemes for older people.

## 3.2 Existing Insight

### Customer Care Checks Data

Analysis of customer care check status data showed that 57% of households who are eligible for customer care checks are now overdue their checks, including people with known vulnerabilities. This proportion rises further if taken into consideration that both main and joint tenants are currently both eligible for separate customer care checks.

The analysis revealed that there is a wide variation on the completeness of customer care checks between regions.

Over 80% of those who are overdue have had contact with Accent for other reasons in the last 12 months representing a missed opportunity to carry out a check during that contact.

Many customers whose tenancies have commenced in the last 12 months have not yet had due dates set for their customer care check, suggesting that the manual process of setting customer care check due dates is contributing to the confusion about when customer care checks are actually due.

The due dates for customer care checks are only reset if the correct combination of options is selected when logging a call on Accent's correspondence management system. This is otherwise a manual process and is often missed.

### Customer Partner Time and Motion Study

Analysis of the Customer Partner role showed the wide variety of tasks that a Customer Partner is expected to fulfil and that the majority are already working over their contracted hours to fulfil these, even without the additional duty of carrying out and recording customer care checks, and following up any matters arising from them.

## 3.3 Additional Research – Customer Care Survey

A survey was carried out to understand how residents felt about customer care checks and whether they were useful. This showed that most customers think some form of contact to check everything is OK is useful, but that many customers had not heard of customer care checks nor understood the aims and purposes of customer care checks.

There is little correlation between customers who have had a customer care check and customers who *report* they have had a customer care check. In other words, some customers report having had a customer care check when actually they have not, and vice versa.

This could be because customer care checks are sometimes carried out as part of everyday interactions. Customers do not necessarily know they are receiving a customer care check.

This suggests that the aims and purposes of customer care checks need to be made clearer; firstly by embedding information about this into the starter tenancy process, and also by making it clear that a customer care check is being carried out when it forms part of a separate interaction.

While 92% of respondents indicated they would know how to get in touch with Accent if they had a query or concern, 67% of respondents did not actually know who their Customer Partner is.

We expect that if customers were more familiar with their Customer Partners, this would improve channels of communication and improve rates of engagement with customer care checks.

### **3.4 Customer Care Checks Audit**

The NSG acknowledges that, at the time of its investigation, a separate audit on customer care checks was carried out, led by Performance Management Analyst, Jane MacKalroy.

This audit was principally focussed on whether customer care checks are being carried out and recorded in line with the existing policy and procedure and was not especially aimed at changing the scope of customer care checks.

The audit led to some important findings, among them:

- Lack of consistency in the way customer care checks are conducted and recorded
- Evidence of last contact with customer being classed as a customer care check but no evidence of the required questions being asked
- Incorrect use of CRM leading to inconsistencies between the customer care check status and the most recent customer care check date shown on reports

Several recommendations were made to improve the consistency and clarity of information recorded. The NSG endorses these recommendations and does not propose to duplicate them in its own recommendations.

## **4. Conclusions**

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The conclusion drawn from this study is that staff and customers are in agreement that customer care checks are useful and needed, but that there are challenges in how they are being carried out. Many customers are not aware of them nor expecting them as they were not heavily publicised, and some customers will not welcome them for various reasons.

Accent employees feel that the checks are important but need to be better targeted towards customers who are vulnerable and households where there is cause for concern, either due to existing knowledge of issues or complete lack of contact from the resident. There are also concerns about who is best placed to carry them out – the initial plan was for Customer Partners to carry them out, face-to-face as part of their job. There seems to have been an expectation that Customer Partners can easily tag these on while carrying out other tasks, but Customer Partners from all regions report that it is not possible to keep up with them, given the practical difficulties in making contact to arrange the visit, and the time constraints involved in fitting them in with existing workload and travel time.

The previous NSG scrutiny on Customer Engagement highlighted the importance of face-to-face contact with customers rather than relying on phone calls. However, despite the desirability of in-person contact, the system of having a customer care check carried out with every customer, face-to-face, every year by Customer Partners is not sustainable at current staffing levels.

Most customers can ask for help if needed, especially if they are already familiar with their Customer Partner and know how best to get in touch. Phone calls can be helpful to triage queries or determine which customers to prioritise for customer care checks.

The volume of checks needed could be reduced through prioritisation, for example by prioritising customers with known vulnerabilities and those where there has been no contact of any type for a long period of time. Homeowners are currently not eligible for customer care checks but it was felt that they should be included where they have known vulnerabilities. Consideration would need to be given as to how to best record vulnerabilities and ensure the information is updated frequently enough to be of use.

There are other opportunities for the checks to be carried out in a different way. Customers who already subscribe to a wellbeing plan, delivered by Independent Living Coordinators and Scheme Managers should not need an additional customer care check.

Contact Centre staff could play a role in the administrative duties associated with customer care checks, such as updating contact details, but it is recognised that they too have high workloads and lack connections with local services that may be useful for following up on matters arising from customer care checks.

Having studied all of the evidence obtained, the NSG agreed ten recommendations listed on the following table.

## 5. Recommendations

	Recommendations	Strategic Priority	Response	Service Area Manager	Target	Measures for success
1	Promote awareness of the Customer Partner role. Ensure that all customers know who their Customer Partner is, what type of queries they can help with and how best to get in touch.					
2	Customers who are already eligible for a wellbeing plan (namely customers in Housing for Older People) should not require an additional customer care check.					
3	All staff to take advantage of inbound telephone contact to carry out overdue customer care checks, where this is possible and practicable.					
4	Recording a customer care check on CRM should automatically set the due date for the next customer care check. There should be no need for staff to update this separately. The CRM 'pop-up' should indicate whether the customer care check is overdue.					
5	Homeowners should be made eligible for customer care checks if they have known vulnerabilities.					

	Recommendations	Strategic Priority	Response	Service Area Manager	Target	Measures for success
	General Needs customers with known vulnerabilities should be prioritised for customer care checks.					
6	Consideration should be given as to how vulnerabilities are recorded to give staff a better indication as to which customers will most benefit from customer care checks.					
7	Make it clear to new customers (in tenancy agreements, at sign-up, throughout the starter tenancy procedure etc.) that Accent will attempt to carry out a customer care check, at least once a year, and what the aims and purposes of the customer care check are, and how the information will be used/stored.					
8	To promote awareness of customer care checks and improve rates of engagement, customers must be made aware that they are receiving a customer care check (if it forms part of a separate interaction) and that the outcomes of the conversation may be recorded as such.					



	Recommendations	Strategic Priority	Response	Service Area Manager	Target	Measures for success
9	Where all attempts to carry out a customer care check have been exhausted (call, email, letter, visit, checking-in with neighbours etc.) the due date for a customer care check may be reset (as long as the rent account is in good order, there is no evidence of anti-social behaviour, the property appears in good condition etc.). Clear notes indicating all steps taken must be recorded and the decision to reset the due date should be communicated to the customer.					
10	Monitor the effectiveness of 'missed customer care check' calling cards, already in circulation in the Yorkshire region. If successful in improving rates of engagement, consider rolling these out more widely.					