

Progress Housing Group			Housing Operations		
Title:	Customer Access Strategy				
Ref No:	GRSTRHM05	Reviewed:	01/11/2023	Version:	1



STRATEGY DOCUMENT

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Group vision, values and strategic aims – available on BoardEffect

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Introduction

Our vision is to “ensure everyone has a place to call home and the opportunity to live their best life”. If we are to ensure this is at our core and deliver our vision, it is crucial that our customers are able to contact us at their convenience with ease of effort. As a Housing provider with a strong focus on our customers, we should also ensure that we have a range of channels via which our tenants and customers are able to contact us.

It is no longer acceptable to customers in any sector to be met with someone who is unable to help resolve their enquiry and often the preference is that enquiries are resolved at the first point of contact. Customer facing colleagues should therefore be provided with the right training, tools and solutions in order to achieve this.

The Group should be clear on how we would like to provide customer contact services and consequently these should match our brand, our vision and our values.

Aims of the strategy

The aim of this strategy is to improve the overall experience for our customers when getting in touch with Progress Housing Group. In doing so, it is important that we provide a range of options/ways to get in touch, from which our customers can select the option most appropriate for them or their contact at that time.

The channels of contact we will provide for our customers are:

- Voice (telephone)
- Face to face (reception)
- Live Chat
- Email
- Social Media
- Automated services e.g.: ChatBot and On Line Customer Account

We will also explore use of other digital/social channels such as WhatsApp and video messaging over the next 2 years.

We are also committed to ensuring we can adapt to new and developing technology over the next 2 – 3 years, in particular use of AI to improve the customer experience, efficiently providing a resolution to more routine transactional customer enquiries. This will enable colleagues to spend more time with the customers who need more support from us via the telephone and ‘face to face’.

In delivering a first class experience for our customers, it is imperative that our Customer Contact Officers are provided with the appropriate training, support, tools & solutions. In addition, in order to deliver against this strategy, we will be required to work in collaboration with colleagues across the business in order to streamline processes, to achieve greater efficiency, consistency and clarity as a result.

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Where are we now?

During the last 3 years, the Customer Contact Centre (formerly Progress Connect) has undergone a number of significant changes. These include multiple changes in leadership resulting in instability, inconsistency and a lack of focus on customer outcomes. In addition, the team previously operated as a hub for the organisation and consequently inherited a number of non-customer contact administrative functions. There has been limited focus on delivering efficiency or first contact resolutions as a result of long complex and unyielding processes.

New Customer Contact handling technology has recently been introduced, however, due to lengthy delays in mobilisation, the technology has already fallen behind alternative and improved solutions in the market. Notwithstanding this, any new solution can deliver some improvements to services however this must be robustly underpinned by a clear and structured Customer Access Strategy. Our current position in terms of our internal environment is consequently impacted by having no current strategy to support a drive towards a customer experience that supports our Group vision and values.

Review of internal environment

(i) Lengthy, complex processes

Current processes undertaken by Customer Contact Officers have not historically been shaped around the ambition to drive an efficient, high quality and first contact resolution focused service. A lack of consistency has also been identified across the Group with a significant amount of bespoke processes developed and shared without the customer nor colleague experience at the forefront of our minds.

The current processes lead to long handling times which in turn lead to high wait times. Furthermore there are no clear and consistent knowledge or scripting tools in place to support a Customer Contact Officer in order to handle a customer enquiry in the most efficient way whilst ensuring it is accurate and avoids the requirement for a repeat, avoidable contact later.

In addition, our current approach leads to a high volume of contacts handed off to other teams/areas of the Group. There is a culture of acceptance as a consequence of this ultimately meaning that customers see non-Contact Centre colleagues as the experts thus driving more and more requests to speak to colleagues such as Housing Officers. With the appropriate training and tools in place, this can be avoided and enable those in other teams to focus on other priorities.

Furthermore, technology is not maximised nor available in order to drive a more efficient way of resolving customer contacts e.g.:

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- Scripting/Knowledge tools for use by colleague or customer (via Chatbot environment).
- AI within voice/IVR framework or chat environment to manage basic enquiries without human intervention.
- Repair diagnostic tool to support accurate assignation of required trade and response time.
- Video/Augmented reality technology to further support efficient and accurate repair diagnosis.
- Use of effective CRM tool to drive a customer service and contact recording culture across the Group.

(ii) Poor Customer Experience

Due to the challenges highlighted within the internal environment, the overall customer experience is currently negatively impacted. On average, circa 40-50% of customers are abandoning their calls each week in addition to experiencing an average wait time of around 20 minutes. This wait time can be significantly higher during our busiest periods with customers on occasion seeing wait times of approximately 1 hour on Mondays.

As previously highlighted, conversation times are long due to poor processes, resulting in colleagues handling an average of 4 calls per hour versus an industry standard of 7.

(iii) Limited channel shift strategy/focus

There is currently limited focus on general contact transformation – ultimately our strategy is to shift transactional contacts to a more automated and efficient environment. By ensuring we have a contact transformation plan/strategy, this will enable us to facilitate colleague's ability to spend periods of time with our customers who really need to speak to us over the phone or 'face to face'.

The omission of a current strategy also leads to a lack of productivity and efficiency from our Customer Contact colleagues, who are likely to be spending lengthy periods of time seeking to resolve an enquiry that may be able to be resolved with little or no human intervention.

In addition, there is currently very limited active promotion of alternative and/or more appropriate channels of contact. Whilst our on-line customer account is promoted within our IVR framework; colleagues both within and outside of the Contact Centre do not actively promote this and often will signpost to making what may be an avoidable telephone contact.

(iv) Operating with a variety of mini-specialisms within the Contact Centre

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Following the merger and creation of RWP, the Contact Centre adopted a specialism approach due to the nature of the RWP customer base. Whilst it is crucial to ensure our RWP customers with very specific needs are responded to in an appropriate way, the creation of such specialisms with a relatively low contact volume and small team has led to bottlenecks and establishment of single points of failure. This consequently poses a risk to the service rather than supporting an enhanced approach.

In a small, compact Contact Centre environments like ours, the flexibility of resource is key and consequently the current approach has limited this and directly impacted all customer experiences.

(v) Limited reporting and visibility of performance

Whilst we are in the process of developing some high level performance reporting data following the migration to our new multi-channel communication platform in June, the Contact Centre does not currently deliver a clear & detailed suite of performance data at team or individual level.

A performance culture can have many benefits, such as colleagues taking ownership to improve their own performance whilst understanding & reaping the benefits to role satisfaction, celebrating success and an enhanced customer experience.

(vi) Limited structure to managing contacts across multiple channels

There is no current clear plan to ensure customers accessing services across multiple channels, including those attending reception, are managed effectively and efficiently. Again, there are specialisms within the team particularly in relation to webchat and reception that have invariably led to bottlenecks and a poor customer experience.

Our reception colleagues were historically recruited to manage a very limited number of customer walk-in enquiries and are also required to undertake a number of facilities' tasks. Consequently this leads to an incredibly inefficient way in which we manage our 'face to face' customer contacts.

Additionally, we currently have a lack of visibility of contacts received via other channels such as Social Media as these are initially responded to via our Marketing & Communications team. This also creates inefficiency in that a hand off to the Contact Centre may be required in order to fully respond to the customer contact.

(vii) Resource not built around our customers

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Whilst Contact Centre resources are at the required level to respond quickly and efficiently manage customer enquiries, it is clear that a full review is required in order to ensure resources are maximised at the times when our customers are more likely to get in touch.

A current Workforce Management (WFM) solution is in place however the benefits gained from this are questionable and may require a more 'back to basics' approach in order to ensure we have the right people in place at the right time for our customers.

(viii) Colleague culture

Historically "Progress Connect" (now the Customer Contact Centre) operated as a hub for the rest of the organisation. As indicated earlier, this has led to a culture of directing all contact and a number of administrative tasks via the Contact Centre. The team's resource is currently appropriate for the volume of contact received, consequently any administrative tasks that take colleagues away from handling customer contact should be handled away from the Contact Centre.

Furthermore, accountability for customer contact is limited across the organisation. Due to legacy processes and cultures, there is a tendency to signpost to the Contact Centre rather than empowering colleagues with the awareness, skills and tools to identify if individuals can resolve personally at first point with customers. This may be out on patch or in other interactions with customers.

It is worth highlighting that non-Contact Centre colleagues currently do not have the required solutions or processes in place to either resolve themselves or assist the customer to do so. In the majority of cases where a colleague does signpost to on-line services for example, this simply generates a task into the Contact Centre to undertake. Development of the Mobile Working Framework in Progress Homes will begin to redress this.

Review of external environment

In order to consider our current position in terms of customer contact and our potential Customer Access Strategy, we must take into account the current external environment.

Benchmarking and research has taken place with a number of similar sized registered providers, forward thinking Housing Associations & commercial sector organisations. The key headline findings were:

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- Cloud based technology used at Contact Centres enabling greater resilience and flexibility.
- Customers want choice – telephone/voice channel remains very much needed in the sector however good practice externally sees a choice of channels enabling voice to be used for more complex enquiries.
- AI emergence offering opportunities to automate responses in more transactional enquiries and also enabling customers to be referred to the right person quickly.
- Chatbot automated flows common practice in sector – enabling customers to self-resolve some basic enquiries eg: re-setting boilers and electrical trip testing
- Same technology used in Chatbot flows for colleague knowledge bases, enabling swifter first time, accurate resolution.
- Use of repair diagnostic tools common practice delivering a more efficient and accurate repair customer contact experience.
- Professional IVRs common in sector – Voice artist solutions frequently utilised to provide a greater professional image of the organisation.
- Greater focus on non-traditional metric KPIs such as first contact resolution, quality of experience and customer satisfaction.
- Where traditional metrics used, sector generally delivering or working towards 10% calls abandon rate and 2 minutes average time to answer.
- Multi-skilled contact centre colleague common practice – call handlers trained to deal with vulnerable customers or their representatives with care and understanding.
- Alternative channels often promoted actively either via automated processes or built in to colleague quality framework.
- Administrative processes not delivered within Contact Centre environment.
- Robust change control measures filtered via Contact Centre environment so as to ensure colleagues handling customer contact continue to resolve accurately at first point and ensuring processes are designed around customers.
- Customer Contact resources built around customer demand.
- Hybrid working common practice however high volume of peers moving to greater office based approach due to fast paced nature of changes in sector.
- Personalisation/Tailoring of contacts becoming more prominent albeit some challenges in the sector around ensuring data held is maintained and up to date in order to deliver this.
- Customer expectations have increased. Customers expect to speak to someone who can resolve their contact and do this quickly and accurately.

What do we need to do to achieve our aims?

A high level action plan has been created and included below. This is supported by a number of more detailed actions that form our Customer Experience operational plans for the remainder of the year and beyond.

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Support from colleagues across the business will be critical to enable us to deliver against the proposed Customer Access Strategy, specifically in all Housing Operations teams, Property teams, IT & Digital Business colleagues, RWP teams and our People teams.

Headline Action	Expected Outcomes	Who	Timescales
Conduct full review of all processes that originate with a customer contact; developing an action plan in order to streamline processes, drive efficiencies & first contact resolution	<ul style="list-style-type: none"> • Efficient processes • Reduced contact handling times • Reduced call wait times <4 mins • Reduced % of abandoned calls <10% • Increased first contact resolution >85% • Improved colleague satisfaction 	Contact Centre Manager; Customer Contact Coordinators; Training and Quality Coordinator; CIT; Project Management; HOMET; Housing Operations colleagues; Property teams; RWP colleagues	Action plan : Nov 2023 Delivery : April 2024
Develop and launch a change governance process to ensure we drive consistent ways of working and ensure where a request to “do something different” is focused on customer & colleague and the most efficient way to achieve a positive outcome	<ul style="list-style-type: none"> • Clear and consistent processes across Group • Processes built around customer and colleague • Meet legislative requirements eg: Consumer Standards • Improved accuracy of response • Increased first contact resolution >85% • Reduced avoidable repeat contact 	Contact Centre Manager; Customer Contact Coordinators Training and Quality Coordinator; CIT; Project Management; HOMET; Housing Operations colleagues; Property teams; RWP colleagues	Launch: Jan 2024
Create and embed Customer Service culture utilising existing Customer Service training and creating space and tools for all colleagues across the Group to be able to either resolve a customer contact or support customer to self-serve	<ul style="list-style-type: none"> • Customer satisfaction >90% • Reduced voice contact by 10% • Increased Customer Account activity 	Contact Centre Manager; Customer Contact Coordinators;	April 2024

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	<ul style="list-style-type: none"> Reduction in complaints recorded 	Training and Quality Coordinator; CIT; Project Management; HOMET; Housing Operations colleagues; Property teams: RWP colleagues; IT/Digital Business teams	
Provide and actively promote a choice of channels at the Contact Centre via which customers can select the most appropriate for their contact to be resolved	<ul style="list-style-type: none"> Increased activity in non-voice channels Reduction in voice contact by 10% Reduction in email traffic via active promotion of chat and Customer Account 	Contact Centre Manager; Customer Contact Coordinators; Training and Quality Coordinator; CIT; Project Management; HOMET; Housing Operations colleagues; Property teams: RWP colleagues; IT/Digital Business teams	Action : Nov 2023
Source and implementation of a Contact Centre knowledge/scripting tool that supports first contact resolution, drives efficiency, quality & customer satisfaction	<ul style="list-style-type: none"> Reduced contact handling times Reduced call wait times <4 mins Reduced % of abandoned calls <10% Increased first contact resolution >85% Improved colleague satisfaction Contact Centre attrition <3% 	Contact Centre Manager; Training and Quality Coordinator; CIT; Project Management; IT/Digital Business teams	April 2024

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	<ul style="list-style-type: none"> • Delivery against regulatory and legislative requirements • Customer Satisfaction >90% • Reduced avoidable/repeat contact 		
Source and implementation of chatbot solution in order to develop and utilise automated flows to resolve 40% of customer chat contact without colleague intervention	<ul style="list-style-type: none"> • Increased activity via chat function • Resolution of 40% of customer chat interactions without colleague intervention • Reduced voice contact • Customer Satisfaction positively impacted • Reduction in email traffic 	Contact Centre Manager; Training and Quality Coordinator; CIT; Project Management; IT/Digital Business teams	April 2024
Review of resources at Contact Centre including Reception ensuring colleagues are assigned to shift patterns that are aligned with customer demand	<ul style="list-style-type: none"> • Reduced call wait times <4 mins • Reduced % of abandoned calls <10% • Customer Satisfaction >90% • Greater efficiency managing reception walk-ins • Improved colleague and business perception due to enhanced face to face experience 	Contact Centre Manager; Customer Contact Coordinators; Training & Quality Coordinator	Jan 2024
Develop comprehensive Contact Centre training plan and skills matrix to provide skills and development opportunity for colleagues	<ul style="list-style-type: none"> • Improved colleague satisfaction • Reduced colleague attrition at Contact Centre • Customer Satisfaction >90% • Greater accuracy of response • Reduced repeat/avoidable contact 	Contact Centre Manager; Customer Contact Coordinators; Training & Quality Coordinator	Feb 2024
Create development opportunities within team eg: first point resolution of "day zero" customer complaints and floorwalking	<ul style="list-style-type: none"> • Increased average level of tenure & experience at Contact Centre • Improved Contact Centre colleague 	Contact Centre Manager; Customer Contact Coordinators; Training &	Jan 2024

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	<ul style="list-style-type: none"> retention/Attrition below 3% First contact resolution >85% Improved complaint satisfaction 	Quality Coordinator; People teams	
Establish, publish and utilise central Customer Contact reporting suite covering performance in all contact channels	<ul style="list-style-type: none"> Greater visibility and ownership of performance Ability to track progress, identify action & celebrate success 	Contact Centre Manager; Customer Contact Coordinators;	Dec 2023
Standardisation of “how we do things” across the Group in order to drive consistency eg: agree what method of contact is used for each type of communication	<ul style="list-style-type: none"> Consistent and clear processes Avoids duplication of effort Ensures all customer contacts are recorded and actions monitored Improved and more consistent level of service provided to customers Improved customer perception 	Contact Centre Manager; Customer Contact Coordinators; Training and Quality Coordinator; CIT; Project Management; HOMT; Housing Operations colleagues; Property teams: RWP colleagues; IT/Digital Business; People teams	Sep 2024
Development of Customer on-line account/portal in order to provide real time action rather than Contact Centre action	<ul style="list-style-type: none"> Reduction in action required will drive improved performance e.g.: Reduced call wait times <4 mins Reduced % of abandoned calls <10% Customer Satisfaction >90% Reduction in voice contacts by 10% 	Contact Centre Manager; Customer Contact Coordinators; Training and Quality Coordinator; CIT; Project Management; IT/Digital Business;	April 2024

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Ensure new and emerging technology is regularly considered eg: Video or augmented technology for repair diagnosis; AI to support contact resolution	<ul style="list-style-type: none"> • Improved customer satisfaction with repairs, customer service • Enhanced customer experience • First Contact Resolution >85% • Increased % of contacts handled without colleague intervention • Increased time spent with our vulnerable customers 	Contact Centre Manager; Customer Contact Coordinators; Training and Quality Coordinator; CIT; Project Management; IT/Digital Business;	Ongoing – explore options during 2024/25
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Those teams and colleagues identified as the “who” are those who we will require support and commitment from in order to deliver against the ambitions of this strategy. It is anticipated that the Head of Group Customer Experience, supported by the Director of Housing Operations will also play an active role in all aspects of the plan. In addition, a number of operational activities are already in progress at the Customer Contact Centre in order to support delivery of this strategy.

It is anticipated that our detailed plans will ensure the expected outcomes are effectively measured in order to demonstrate & celebrate success or identify where further action is required.

Whilst access to Progress Housing Group and its services is predominantly delivered by the Customer Contact Centre, this strategy is very much aimed at ensuring the entire Group work together to ensure we embed a Customer First culture; always thinking customer in every action we take or decision made.