

Customer experience strategy

2019-2022



SAXON
WEALD



Great homes, building futures



Introduction

This strategy sets out Saxon Weald's vision of a great customer experience and outlines how we will deliver it. It builds on the success of the customer service strategies published in 2015 and 2017, and takes us from focussing on front line customer service to looking more broadly at customer experience across the organisation.

Customers in the context of this strategy include tenants, leaseholders, shared owners and applicants for both lettings and sales.

The purpose of this strategy is to:

- Enhance customer experience and ensure consistently high levels of customer satisfaction.
- Ensure we are meeting the diverse needs of our customers.
- Ensure the voice of the customer is heard.
- Help us allocate resources more efficiently and effectively.

In delivering this strategy we will not only be meeting our corporate strategic aim of delivering a great customer experience, but will also be enhancing our reputation, helping us recruit the best people and developing our business.



Excellent customer service can't be described in one word.

Themes

The strategy is broken down into three main themes:

1 Insight and feedback

We will develop our understanding of our customers and their views and use this insight to deliver targeted services that meet our customers' needs.

2 Channels and access

We will offer a flexible, multi-channel approach which makes it easy for customers to access our services. We will improve our digital offer across the business to encourage use of online services as a channel of choice.

3 Quality and delivery

We will demonstrate our commitment to putting the customer at the heart of service delivery.

Background

The customer service strategy 2015 – 2017 led to the successful implementation of our customer relationship management (CRM) system, enabling us to track and manage customer contacts effectively. It also resulted in the restructure of front line services to create a single customer service team.

In 2017, the customer service strategy was updated to reflect a 'digital first' approach. This set out our aspirations to move towards more digital ways of working to meet both customer demand and create efficiencies. This prompted the launch of our self-service portals which now have approximately 3500 members.

In November 2018, Saxon Weald's new corporate plan was published, which set out a strategic aim to 'deliver a great customer experience'. This included ensuring we understand our customers and their views and use that knowledge to influence service development. The plan also contained two specific targets in relation to customer experience:

1. Customer satisfaction to exceed 85%.
2. 50% of our most frequent customer transactions to be digital by 2020.

We will be building on these targets through this strategy and aim to achieve:

1. Customer satisfaction of 88% by focussing on achieving greater consistency of satisfaction among different customer groups.
2. 70% of our most frequent transactions to be completed online by 2022.

Context

Operating environment

Our operating environment continues to be challenging, with on-going political uncertainty, a slow economy and stagnant housing market all adding to our concerns. 2019/20 also marks the last year of the rent reduction regime, making it our most financially difficult year, so using customer insight to ensure we are prioritising resources effectively is essential.

Regulatory background

In regulatory terms, the tenant involvement and empowerment standard sets out required outcomes for:

- customer service, choice and complaints;
- involvement and empowerment; and
- understanding and responding to diverse needs.

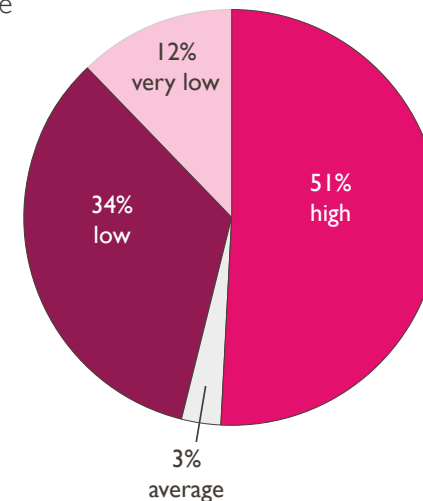
We are awaiting the outcomes of the Green Paper 'A New Deal for Housing', published in August 2018 and we also wish to respond positively to the National Housing Federation's plan 'Together with Tenants'. This is likely to mean an increased emphasis on transparency around performance and ensuring tenants' views are listened to.

Digital age

Use of the internet continues to grow, with the Office for National Statistics estimating that 90% of households now have access to the internet. The biggest area of growth has been in households consisting of one adult aged 65+, which has grown from 36% having access in 2012 to 59% in 2018. While this is positive in terms of potential take-up of our online services, our own detailed customer analysis shows why it is essential we retain a multi-channel approach. Indeed, our segmentation data from Greenstone reveals that only 51% of customers have high potential to be a digital user.

Potential to be a digital user: Percentage of customer base.

Source: Greenstone



1

Insight & feedback

We will develop our understanding of our customers and their views. We will use this insight to deliver targeted services that meet our customers' needs.

Where are we now?

- Like much of the housing sector, Saxon Weald is data-rich but insight poor. We hold a huge amount of information about our customers and their use of our services, however the reliability of the information is variable and we do not consistently use this data to influence our daily activity, develop our services or plan our budgets.
- There is a commitment within the 2019-2022 corporate plan, that we will improve our understanding of who our residents are and use this insight

more widely and proactively. A project is underway with consultants, Greenstone, to create meaningful customer groupings with results due by May 2019.

- In terms of customer feedback, we undertake a compulsory monthly STAR (Survey of Tenants and Residents) through Voluntas. For 2018/19, this survey shows impressive customer satisfaction at 87%. Relatively little analysis has been done to see if there are any groups who are disproportionately dissatisfied.
- In addition, service areas deploy their own surveys. Control over the frequency, method, sample size and questions are decided at service level. Analysis of results is also conducted at service level and learning is not routinely shared across the organisation. This means customers may receive multiple surveys from us in different formats, but potentially asking similar questions, all at the same time.
- In addition to surveys, service areas carry out ad-hoc resident consultations as required for service development. Use of email and social media to consult digitally has proved extremely effective in the last year, gaining higher response rates and better representation than traditional postal questionnaires or consultation meetings.

What does the future look like?

- We will use customer insight and operational data in a more co-ordinated way to shape and improve services and communications, delivering the best possible outcomes for our customers while making the most effective use of our resources. We will use data responsibly and ensure all activities are GDPR compliant.
- Importantly, we will use data to identify customers who may require more intensive intervention, proactively providing housing management and support services to help them manage and sustain their tenancies. We will also cross-reference customer data with property information to see where our worst performing properties coincide with our most vulnerable residents, enabling us to target our support.
- Satisfaction surveys will be coordinated centrally, to improve quality, consistency and accountability. Digital methods of survey collection will be favoured over postal questionnaires, creating potential cost and efficiency savings.
- Feedback from all surveys will be combined with complaint information to give us a more complete overview of what residents are telling us about our services. Satisfaction information will be analysed against customer segments and geographic information to show whether satisfaction levels are consistent. We will build our understanding of what drives any inconsistencies, and work towards reducing those where possible.



- We will consult with residents on how they want to be involved in the scrutiny of our services. We will develop a flexible framework for resident engagement based on the response, enabling us to adapt the consultation method to the groups we are seeking to engage.
- We will be able to demonstrate the impact of the customer voice and communicate this to residents regularly through our newsletter, Spotlight.

2

Channels & Access

We will offer a flexible, multi-channel approach which makes it easy for customers to access our services.

Where are we now?

- Our customer support team handle approximately 9000 contacts per month. 68% of customers contact us by telephone, compared to 23% by email and 9% by other digital channels. Customer contacts to the customer support team are answered in a timely manner; with our CRM system ensuring accountability. Customer call backs are monitored, with most teams achieving our 36-hour response time target. However, direct customer emails to other teams are not routinely monitored and response times are not consistently measured.
- Customers are able to access a number of our services 24/7 via our My SaxonWeald and My Weald Living portals. Approximately 3500 residents are registered for these services, with around 1300 people using the portal each month.
- Saxon Weald's website attracts approximately 8000 visits per month, with Weald Living attracting a further 1400. Our websites are mobile optimised, ensuring the 52% of users who access our websites using a tablet or mobile device get a good experience. Our Saxon Weald Facebook page has 645 followers.
- Our aim is to have 70% of our most common transactions completed online by 2022. These comprise making a rent enquiry, taking a rent payment, logging a repair and changing a repair appointment. At December 2018, year to date figures showed 40% of these were happening online, though online payments far outweigh online repairs.
- Our customer communications are good, however, there can be inconsistencies. While we advocate use of plain English in our written communications, this is not routinely checked and staff training in plain English has not taken place for some time.
- In an age of texts, emails and web messages, printed letter remains our default mode of outgoing written customer communication.

What does the future look like?

- We will maintain a multi-channel approach, but will look to improve our digital offer across the business to encourage online users. This will go beyond the portal to review what other services could move online, with an emphasis on those which create efficiencies while also enhancing the customer experience.
- We will undertake research into the reasons why people do not use the portal, and use this insight to develop both usability and our marketing communications. To achieve our goal of having 70% of common transactions completed online by 2022, we will need to increase repairs reported online from 14% currently to 50%. A review of what repairs can be self-reported will be required.
- Service response times across all teams will be reviewed to ensure target times are reasonable and consistent. Monitoring systems will be in place to ensure targets are being met.
- We will work with residents and use call category information to review our websites. We will ensure they are easy to navigate, contain the information people need and offer as much functionality as possible. We will consider service demand and cost savings from channel shift in deciding what functionality to develop.
- We will use customer insight to review digital usage among customers. We will actively target marketing at those who we know are online but not signed up to My SaxonWeald. We will also explore ways to tackle digital exclusion among our customers.
- We will work towards reducing the amount of postal communications we send where possible. This will reflect the preferences of our customers while creating business efficiencies.
- Customer communications will be co-ordinated, informative and timely. All written communications will use plain English, ensuring our customers can easily understand our messages and reducing the need for follow-up phone calls. Regular checks will be in place and staff will receive appropriate training. We will use customer insight to improve the effectiveness of communications where possible.
- We will seek to grow our social media presence, as an immediate way of providing service updates, engaging with residents and sharing our news.



3

Quality & delivery

We will demonstrate our commitment to putting the customer at the heart of service delivery.

Where are we now?

- 'Valuing customers' is one of our four company values and our 2017 staff survey revealed that 91% of staff feel we listen to customers and take their feedback on board. We have always taken pride in our customer service and this is reflected in the high levels of satisfaction we achieve overall. However, there are of course areas for improvement, where specific services or groups are not showing the high satisfaction levels we aspire to.
- Our complaints procedure was reviewed in May 2017. It now has just two stages, cutting average resolution times substantially. In 2018/19, we received 21 complaints and 452 expressions of dissatisfaction. A regular complaints report is produced for Board, but is not widely shared so limiting the opportunity to learn from mistakes. Complaints reporting to residents could also be improved.
- We are striving for a culture based on innovation and staff empowerment, but have mixed messages from staff in this respect. The 2017 survey showed that 91% of staff felt empowered to make decisions within their role, but only 71% of people felt it was safe to speak up and challenge the way things are done.
- Our net promoter score as measured by our STAR survey is 33.2 year to date. This is slightly down on last year's score of 36.8 but still compares well with our HouseMark benchmarking peer group where 33.6 is upper quartile performance.
- All staff attend our in-house 'APE - A Positive Experience' training on our customer first culture, which is always well received. Some specialist training for the customer support team has been provided, but we have not attempted to gain any kind of external validation of the quality of our customer service.
- Performance information is published to tenants annually. The information is kept at summary level to make it easy to digest.

What does the future look like?

- Customer service training and a network of customer champions will ensure that customer focused behaviours and attitudes are evident and expected at every level of the organisation. Staff will routinely challenge each other when these standards are not met. Positive attitudes are valued and staff will feel empowered to do the right thing toward customers. Compliments will be regularly published on the Loop to celebrate great performance.
- We will support a culture where complaints are viewed as an opportunity to learn and improve. Regular complaints reports will be shared across the company, and complaints reporting to tenants will be improved in line with recommendations in the Housing Green Paper. We will also meet the requirements of The National Housing Federation's plan 'Together with Tenants'. Examples of best practice will also be shared, enabling people to learn from the good as well as the bad.
- We will use the Institute of Customer Services to benchmark ourselves against the type of organisations our customers are familiar with, such as banks, utility companies and online retail outlets. We will work towards achieving the Institute of Customer Service 'ServiceMark' accreditation. Each service strategy will have its own customer experience commitments.
- We will use customer feedback and satisfaction data to help us prioritise a programme of customer journey mapping. Effective customer journey



mapping will help us see our services from our customers' perspective, identifying common customer pain points and showing us where we can improve the customer experience.

- We will review the performance information we publish to residents to ensure we are open, accountable and transparent, and will encourage residents to give us feedback on the results.

Implementation

The strategy action plan sets out a timetable for delivery of the components which will enable the strategy objectives to be met. Progress in implementing the action plan will be reported to Executive Team quarterly and to Saxon Weald's Board annually.

Value for money

- Understanding our customers and their behaviours will help us allocate our resources more efficiently and effectively, meaning value for money is inherent throughout this strategy. However, exactly what impact will be made is at yet unknown, as we cannot anticipate the results of our research.
- Encouraging customers to use our self-service portal will reduce call volumes to our customer support team, enabling them to focus more of their time on people who need greater assistance, or to undertake additional tasks. Given that some digital transactions still require staff input, it is realistic to expect that achieving our digital target will create an efficiency saving of approximately £20,000 per year to be reinvested in services by 2022.
- Ensuring our websites and social media channels are performing effectively and that our written communications are clear should reduce the need for phone calls or follow up contacts. We will

continue to measure the volume and reason for contacts, working to reduce unnecessary contacts wherever possible.

- We will aim to reduce internal print and postage costs by £10,000 over the life of this strategy by making better use of digital contact channels.
- Improving our satisfaction surveys means that the resources spent on undertaking the survey are worthwhile and we can be more confident in the results, using them to make service improvements where necessary.
- Effective customer engagement will inform decision making and ensure we are using our resources on the things that matter most to our residents.
- We will review our customer experience suppliers every 2-3 years to ensure we have the correct balance of quality and cost.

Conclusion

This strategy sets out how we will achieve the corporate plan's ambition of improving the customer experience through a better understanding of our customers and their needs. It advocates a seamless multi-channel approach, where digital services are promoted but not mandatory, and demonstrates our commitment to putting the customer at the heart of our business.





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