

Customer Experience: Resource Guide for Housing Associations

For SFHA members



**Innovation &
Future Thinking**



www.sfha.co.uk/housinginnovation

sfha
Scottish Federation of
Housing Associations

We are housing Scotland



What is in this guide?

The guide has been designed to support housing associations to design great customer experiences, which are:

- Co-designed
- Based on empathy
- Easy, quick, flexible and intuitive to use
- Used and validated by housing staff.
- Cost effective

This should help achieve the following impacts:

- Better customer experiences and satisfaction
- Building trust
- Value for money/ efficiencies
- Better customer engagement
- Higher staff satisfaction
- More agile sector comfortable with change.

Guide Authors

This resource has been produced as part of the Scottish Federation of Housing Associations Innovation and Future Thinking programme.

This resource was created by **Bryony Willett, Maryhill Housing Association** and **Shelley Hutton, Castle Rock Edinvar Housing Association** who are SFHA members involved in the Innovation community.

Four Methods

In this toolkit we provide four different approaches to reviewing the same service/ policy/process. The benefits really come when you complete all four. This sounds like a lot of work but honestly it's not. We've kept each of the different methods as simple as possible and we think you can complete all of your practical workshops/sessions in just one day.

Method 1: Best practice approach

Drawing on guidance and other examples to produce a process. See Method 1 on page 3.

Method 2: Staff engagement approach

Holding a workshop with staff to produce a process map. See Method 2 on page 4.

Method 3: Traditional tenant participation approach

Holding a workshop with tenant scrutiny/ other tenant group to discuss the process and agree changes/ improvements. See Method 3 on page 6.

Method 4: Customer experience approach

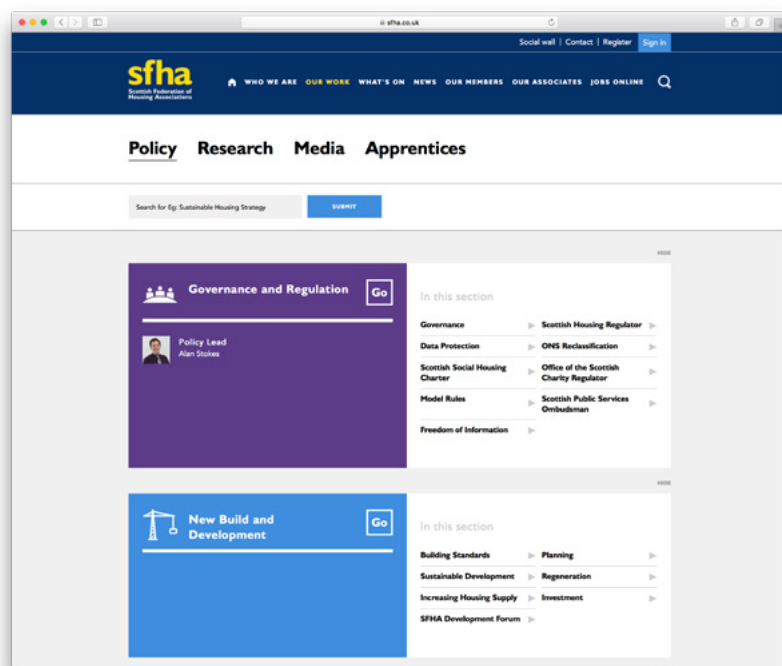
Gaining deep insight into the customer experience and pain points to redesign the process. See Method 4 on page 8.



Customer Experience: Resource Guide for Housing Associations

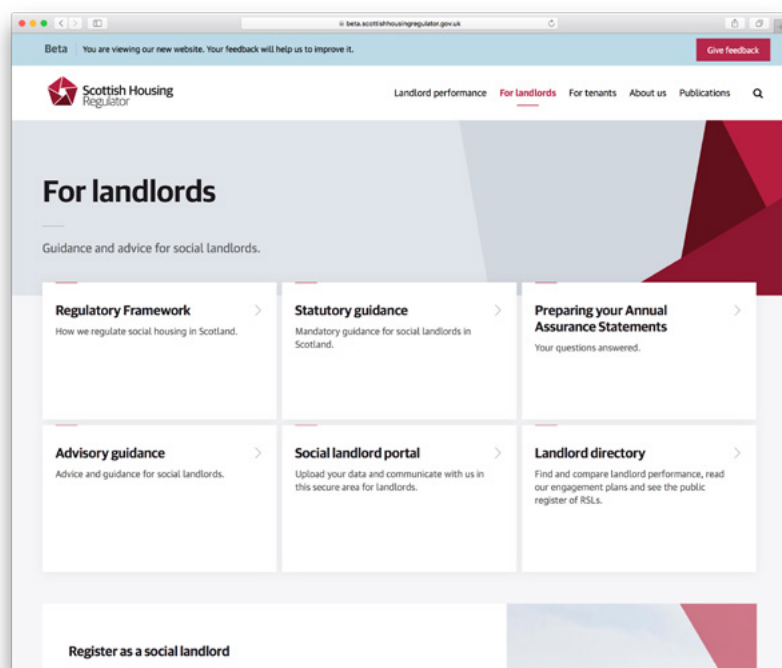
Method 1: Best practice approach

There is a wealth of Best Practice information, case study examples and guidance available from the following sources:



www.sfha.co.uk/our-work

At SFHA's website you will find information, updates and resources relating to a range of areas including governance and regulation, housing and allocations management, and social security.



<https://beta.scottishhousingregulator.gov.uk/for-landlords>

The Scottish Housing Regulator's website provides statutory guidance and advisory guidance for landlords.



Method 2: Staff engagement approach

This approach involves holding a workshop with staff to produce a map of the current service/policy/process being reviewed and identify areas for improvement.

The workshop is an interactive session which gives staff the chance to have their say and feed into the service/policy/process. It can be completed by a large or small group, however it should include representatives from different parts of the business involved in the service/policy/process, as appropriate.

The workshop should last about 1 hour.

At the end of the workshop the facilitator should take a photo of the outputs which will feed into how the service/policy/process should be improved.

Workshop Format

1. Introduction from facilitator – 5 minutes
2. Group workshop – 50 minutes
3. Wrap up – 5 minutes

What you'll need

- Pens
- Plenty of post its in 2 different colours
- Flipchart or large pieces of paper
- Camera/ phone to capture the outputs.

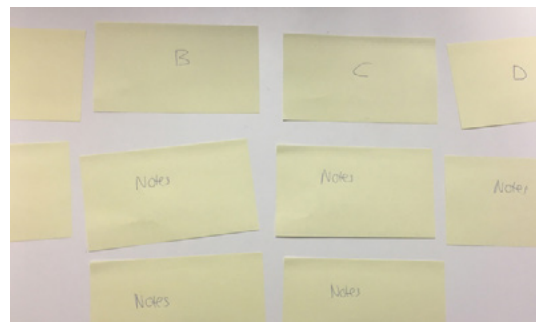
If you have a large group you should split into smaller groups, all of which can complete the same exercise at the same time. We would recommend no more than 8 people in each discussion.



Customer Experience: Resource Guide for Housing Associations

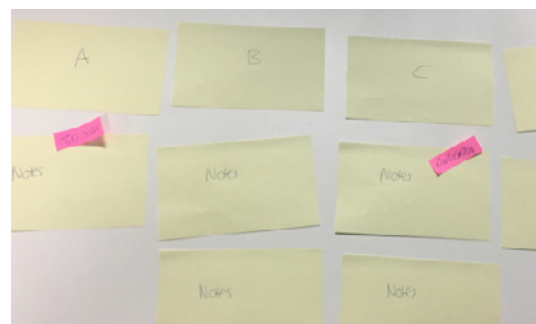
Step 1

Following an introduction from the facilitator, the groups are invited to discuss the current service/policy/process and use 1 colour of post-its to map the process. One post-it should be used for each step in the process.



Step 2

Groups should then consider what would make the service/policy/process better for customers and staff. Using different coloured post-its, the groups identify possible changes and improvements to the service/policy/process.



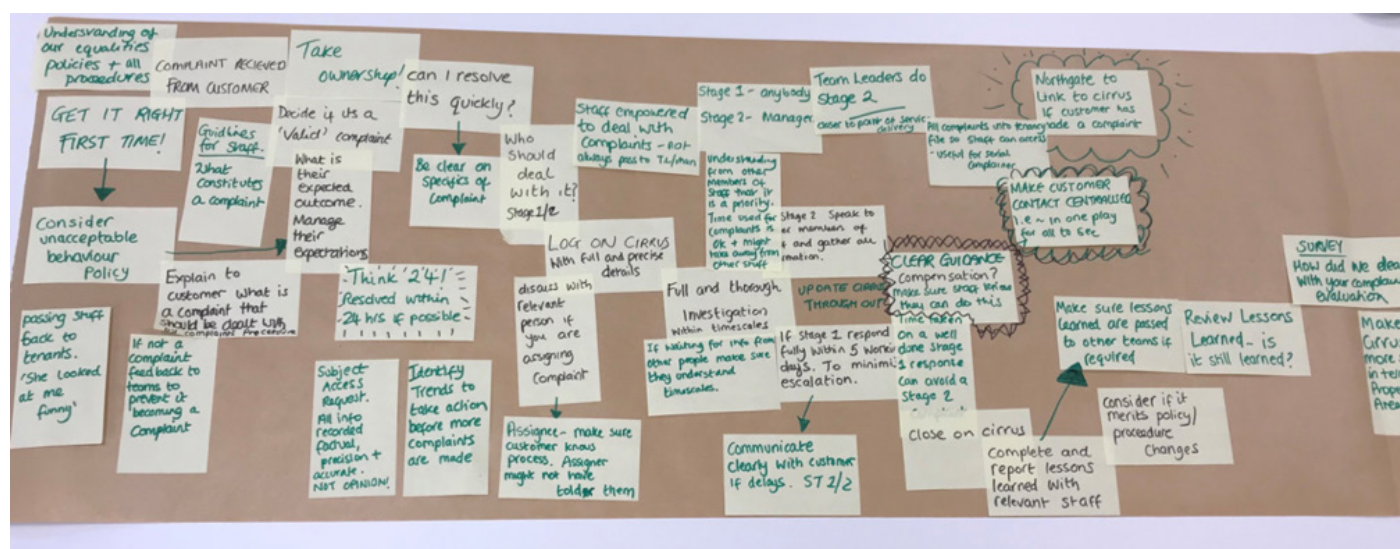
Step 3

If there is a large group with a number of different conversations, each group can share their outputs with the larger group.

To wrap up, the facilitator explains what will happen with the outputs from the session.

The facilitator takes photos of the outputs.

Please see below example output from Castle Rock Edinvar's review of their complaints process using this method:





Method 3: Traditional Tenant Participation Approach

This approach involves holding a workshop with tenant scrutiny/ other tenant group to discuss changes/ improvements to the service/policy/process.

The workshop is an interactive session which gives tenant representatives the chance to have their say and feed into the process. It can be completed by a large or small group.

The workshop should last about 1 hour.

At the end of the workshop the facilitator takes a note of key findings using the template below.

Workshop Format

1. Introduction from facilitator – 5 minutes
2. Group workshop – 50 minutes
3. Wrap up – 5 minutes

What you'll need

- Pen and paper to note key points

If you have a large group you should split into smaller groups, all of which can complete the same exercise at the same time. We would recommend no more than 8 people in each discussion – each discussion will need a facilitator and note taker.

Step 1

The facilitator introduces the session and makes everyone comfortable with the topic.

A copy of the current policy/process should be shared with the group, and participants should be given time to read the document.

Step 2

Groups are then invited to discuss the following questions

- What do you think of the housing association's service/policy/process?
- Have you ever had to use this service/policy/process? If so, how would you describe the experience?
- Can you suggest one or two ways in which the service/policy/process could be improved?
- Is there anything else which we have missed in the discussion which is important here?

The note taker notes key points during the discussion.

If there is a large group with a number of conversations, each group can share their outputs with the larger group.



Step 3

To wrap up, the facilitator explains what will happen with the outputs from the session. The facilitator/ note taker completes the form below.

Please see below an example of what a completed form looks like.

Tenant Participation Workshop Output - Example	
HA name	Scottish HA
Date of workshop	15 October 2018
Participant profile (No of people, demographics)	Scrutiny Focus Panel: 10 participants 25-35 (2) 50-55 (6) 65-75 (2)
Key points of interest/ themes	<ul style="list-style-type: none">• Complaints Process – customer perspective on how to improve• Feedback - clear information• Ongoing communication• Trusting what customer says• Communication methods (not just digital)
Suggested improvements to complaints process	<ul style="list-style-type: none">• Ensure you use Plain English e.g. “vexatious” - who says that?• Make sure all staff know that customers don’t have to use the word “complaint” for it to be a complaint. There is a potential for under-reporting complaints.• Make sure tenants are kept in the loop and that we follow-up.• Make it clearer what can’t be complained about e.g. in leaflet.• Trust in customer knowledge and experience.• Lessons learned – service improvement needs to be sustained over a period of time, documented/recorded and make sure all involved know e.g. new contractors.• Make sure tenants understand it’s positive to complain – not negative reflection on them and won’t affect their tenancy.• Need to be clearer on compensation in leaflet.• Include office telephone number on the leaflet.• Need to make sure we have other approached as well as digital approach.
Memorable quotes	<p>“if it’s all online people don’t know what to ask for”</p> <p>“it all got technical...they needed evidence and asked for photos”</p> <p>“people are reluctant to complain...think they’ll get evicted” [older customer mind-set]</p> <p>“repairs that result in complaints is a waste of time”</p>



Method 4: Customer Experience Approach

This method aims to gain deep insight into the customer experience, to understand pain points for the customer, and to redesign the service/policy/process with the customer.

The housing association should make contact with tenants who have recently experienced the service/policy/process. This can be done during a planned interaction e.g. regular home visit, or you can contact the tenant specifically to ask if they would be willing to share their experience to help identify improvements to the service/policy/process.

You should aim to meet at least two and five tenants.

Discussion setting and context

- The discussion should take place wherever suits the tenant, preferably in their home or another place outside an office e.g. local café. It is important to make the tenant feel very comfortable and at ease. The discussion could also take place over the phone which might be particularly appropriate for associations with wide geographical spread.
- The discussion is to find out about the detail of their experience. Ask them to remember how things were before the process started – how did they feel about the housing association, any other things happening to them in their home or life that they would like to share?
- Then ask them to share what happened first to initiate the process, and how they felt at this time. And then what happened next, and how did they feel then? Continue with these open questions to guide the tenant through their experience until you have an understanding of what happened from their point of view and how they felt at each stage.
- You should be building a picture of the aspects which caused them the most negative feelings e.g. stress/ anxiety, and whether this worsened or lessened as the service/process progressed.
- Try not to defend the housing association – even if a tenant has misunderstood the process or the organisation's response, their feelings and perceptions are real to them so just listen and note what they say.
- The purpose is to build understanding and empathy with the tenant. It should not feel like a formal interview, but a discussion to help us really understand what is most important to the tenant, to make sure we focus on the right things for them in the future.

After the meeting, complete the form below – their customer journey.



Customer Journey Map

Journey Map Example 1 - Complaints

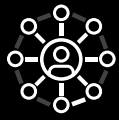
Touchpoints	What happened? Title the touchpoint	Damage to roof during maintenance	Another example – broken communal washing machine	
Channels	Phone, email, person, online	Phone	Face to face - onsite manager Asked manager for update after 4 weeks	
Customer interaction	How/ why customer is involved	No follow up repair so chased us.	Was told 'email has been sent'	
Company interaction	How/ why company initiates/ responds	We said no rain in 6 weeks so no issue. And referenced tenant's home insurance. Said roofer off sick.	Was told 'email has been sent'	
They feel	How is customer feeling e.g. confused, frustrated, surprised	Not pleased at need to chase up and not pleased at response.	Helpless and clueless	
Pain points/ opportunities	Possible solutions that could benefit interaction during this touchpoint	Follow up repairs. Communication when chased up. Apologise. Get it right 1st time.	Give details and reasons. Apologise.	Be less defensive Understand why people react the way they do.



Customer Journey Map

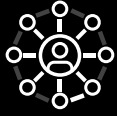
Journey Map Example 2 - Complaints

Touchpoints	What happened? Title the touchpoint	Terrible stair cleaning		
Channels	Phone, email, person, online	Phone		
Customer interaction	How/ why customer is involved	Ongoing complaints re service		
Company interaction	How/ why company initiates/ responds	We say we 'emailed a colleague' No feedback to customer Say need 1+ report for communal issues	Too many people to their home to check. Staff only give first name.	
They feel	How is customer feeling e.g. confused, frustrated, surprised	"I don't phone for fun" – annoyed at having to repeatedly	Not believed. Frustrated. Embarrassed. Upset.	
Pain points/ opportunities	Possible solutions that could benefit interaction during this touchpoint	Call customer & give feedback	Lose the defensiveness	



Customer Journey Map

Touchpoints	What happened? Title the touchpoint			
Channels	Phone, email, person, online			
Customer interaction	How/ why customer is involved			
Company interaction	How/ why company initiates/ responds			
They feel	How is customer feeling e.g. confused, frustrated, surprised			
Pain points/ opportunities	Possible solutions that could benefit interaction during this touchpoint			



Template

Tenant Participation Workshop Output

HA name	
Date of workshop	
Participant profile (No of people, demographics)	
Key points of interest/ themes	
Suggested improvements to complaints process	
Memorable quotes	