
Title: First Point of Contact Resolution/Failure Demand
Report of: In-Depth Review Group
Status: Decision

1 PURPOSE

1.1 The purpose of this report is to present the findings of the Thirteen Customer In-Depth Review group, on the topics of First Point of Contact/Failure Demand. This in-depth review was commissioned by Ian Wardle.

- a) The First Point of Contact target is 80% - Q2 figure was 74.77% - the aim is to be 80% or higher.
- b) The Failure Demand target is 10% - Q2 figure was 17%- the aim is to be 5/6%
- c) To get Neighbourhoods, Repairs & Maintenance and Investment & Asset to understand how and why their actions affect service delivery, target figures and get them to help reach the targets.
- d) Failure and Demand – look at solutions
- e) Strategic Actions - aim is to deliver great customer service
- f) Pilot – the new opening hours of 5pm to 8pm effective from 12/10/18
- g) Procuring new PCI DSS- enabling Thirteen to take debit card information securely
- h) Procuring Contact Centre Solution – a performance tool that allows for a ‘virtual’ contact centre. This would enable advisors to work from home making the contact centre disaster proof and ensuring that extreme weather conditions would not affect performance.

2. DETAILS

2.1 The In-Depth Review Panel considered the above and our course of action is detailed as follows:

- Initially a presentation was given to the Panel by the Senior Customer Service Manager. The Panel were given details of the current First Point of Contact Resolution/Avoidable Contact (**Appendix 1**) and Failure Demand figures, together with documentation relating to this area (**Appendix 2**). The Panel were made aware of the current situation with a request to look in-depth and report on the findings, together with a list of recommendations for improvement (**Appendix 3**).
- The Panel formulated an Action Plan, starting by looking outside of the Contact Team. Numerous meetings were arranged with department managers. The managers were given the following set of questions to answer:
 1. What do you think is the main cause for failure demand in your service area?
 2. What are the 3 strengths and 3 weaknesses in your service area that are contributing to the failure demand?
 3. Are there any obstacles or other service areas that are preventing you from improving the failure demand?
 4. Have you already put in place anything to improve failure demand?
 5. What help do you need from us to reduce your failure demand?
- All managers were open and honest when answering the questions. They made statements as to the current situation and gave outlined details for improvement. They took ownership and confirmed that a raft of improvements are now being put in place to address this issue. With these changes being implemented the Panel decided to let them develop further before making any comment. In order to evaluate these changes, the Panel will revisit this area as detailed at 4.3 below.
- The Panel split into small groups to visit and observe the operation of the Contact Team. This also included the pilot scheme operating from 5pm until 8pm. All observations were fully recorded and reported back to the full Panel.
- Observations were made during the twilight shift (5pm to 8pm) of Neighbourhoods operating at the same time (Debt Hit squad). This was proving successful and had a positive impact thus improving the customers experience.

- A further meeting was arranged with the Senior Customer Service Manager to validate certain findings and to obtain information.
- A meeting was held with the Service Improvement Analyst to clarify the performance documents. **(Appendix 4)**

The Panel would like to take this opportunity to thank all members of staff who assisted in the making of this report.

3. RECOMMENDATIONS

After completing all research and analysis, the Panel is recommending that the Board approves the following improvement actions.

Key Recommendations:

Training

- 3.1 Mandatory training on Orchard dashboard, for all staff who access Orchard, with a comprehensive training package.
 - a) A system of training for everyone on Orchard dashboard needs to be established. This should be compatible with all delivery levels and services to meet the required standards and be competent to encompass the integrated systems within dashboard (currently only *a brief induction* to dashboard is being given to new staff; existing staff are reliant on previous start-up induction training)
 - b) Refresher training to be carried out annually.
 - c) All training to be recorded; including refresher training and updates on improvements to dashboard.
 - d) Training is also to include Orchard Work Explorer for managers and team leaders. This will enable managers to monitor and understand work items within their teams and come up with solutions if these are not responded to within SLA. This is subject to individual levels of involvement in the bolt on areas being used to update dashboard.
 - e) Awareness training on Orchard work items and the wider impact on Failure Demand if these are not responded to.

- 3.2 Departmental managers need to be responsible for and take ownership of all training. This includes all content and recording of all training records which captures new starters.

- 3.3 Departmental managers should meet on a regular basis to network with each other on the running of dashboard.

The In-Depth Review Panel asks the Board to approve the above training and associated actions, including developing the training plan into a comprehensive manual.

Communication

- 3.4 Every interaction with customers, **both incoming and outgoing**, must be recorded on Orchard dashboard. This must include all actions being taken or directed and give full details of the current situation.
- a) These records on dashboard must be in a way to allow all staff to be able to read and understand exactly what is happening on the customer journey.
 - b) Staff must be responsible and take ownership of recording and updating records on dashboard.

The In-Depth Review Panel asks that the Board approves the above, and that this be included in the training manual.

Pilot Scheme

- 3.5 The current pilot scheme, opening the Contact Centre from 5pm to 8pm, is proving successful. To date £41,000 in rent arrears has been recovered. This is in addition to the arrears taken by the Neighbourhoods 'Debt Hit Squad'. Our recommendation is that this pilot scheme should now go live and be advertised.
- 3.6 In order to enhance the live running of the twilight shift, the Board is asked to approve a new pilot scheme. This would include the addition of other departments to be active at the same time (repairs, neighbourhoods, support services etc.)

IDT

- 3.7 In order to accommodate the above recommendations actions will be required from IDT as follows: -
- a) Double entry or stamp on dashboard – when working on another part of Orchard e.g. CAS or Rents, staff leave notes on that part of the system but this does not automatically show up on dashboard. To

avoid staff having to enter their notes twice IDT would be asked to implement a process that will leave a stamp on dashboard to show that there are notes on another section of Orchard, eliminating the need for notes to be left twice and saving the staff time.

- b) Orchard dashboard to be reviewed/modified to allow for a pending status for more complex enquiries to obtain further information before the contact is closed. The present categories are 'value' or 'failure'. If it's not one of value then it's defaulted into failure; this is not an accurate record of the current situation.
- c) Contractor Portal on Orchard – allow for a system for contractors to communicate appointments, phone calls etc that staff can access.
- d) Power BI – an introduction of a section on Power BI which would enable performance figures to be viewed and give the ability to pull reports from. In line with the above, the Performance team to make available, on a weekly basis, individual teams outstanding work items. This, if monitored correctly, will have a positive impact on future failure demand. For this to be effective it is further recommended that a weekly league table be compiled from the uploaded figures for each department. This will be compiled and collated into **Appendix 4**.

Secondary Recommendations

- 3.8 To consider a system that would allow customers to make debit/credit card payments in the knowledge of the payment being taken in a safe and secure way, which also ensures that Thirteen are compliant with GDPR.
- 3.9 To consider an application/tool that allows for a “virtual” contact centre allowing advisors to work from home. This would protect the company in the event of extreme circumstances or unforetold events. This would also help with the work/home life balance of advisors.
- 3.10 The Performance team to take a snap shot of the current statistics relating to dashboard. This is to take place every other month to allow for the measurement of any improvements that have been or are in the process of being improved (first snapshot at 3 March 2019 as shown at **Appendix 4**). This information would be reviewed by the In-Depth Review Panel, and form part of the Action Plan.

The In-Depth Review Panel asks the Board to also approve the above secondary recommendations.

4. ADDITIONAL OBSERVATIONS

- 4.1 The In-Depth Review Panel had numerous meetings with department managers. During these meetings, and on subsequent information being obtained, all managers commented in the same way - that they did not agree with the current Failure Demand recording, appertaining to the individual department under their remit. All managers stated that they are now addressing the current situation, and that many improvements are now being considered and put into place.
- 4.2 In order for this to develop further the Panel considered the lines of improvement and decided to park this avenue of review, giving time to allow the department managers to take ownership, and make the changes necessary to facilitate and address the areas of Failure Demand appertaining to their own areas.
- 4.3 For the Panel to be assured of these improvements, it was decided to revisit this area in May, July and September.

Appendices:

Appendix 1	Contacts 2018/19 (to end Nov 18)
Appendix 2	Presentation by the Service Improvement Analyst
Appendix 3	Presentation by the Senior Customer Service Manager
Appendix 4	Information as at 3/3/19

Appendices:

Appendix 1:

All Contacts 2018-19 (to end Nov 18) - sorted by highest NUMBER of Failure contacts

Count of contactID	No.	No.	No.	%	%
Category	FAILURE	VALUE	Grand Total	FAILURE	VALUE
Repairs	23,247	64,603	87,850	26.46%	73.54%
Income Management	4,757	52,600	57,357	8.29%	91.71%
Tenancy Management	5,974	43,353	49,327	12.11%	87.89%
Compliance (Gas/Electric)	6,230	21,312	27,542	22.62%	77.38%
Lettings	2,475	21,551	24,026	10.30%	89.70%
Contact Team	1,875	11,615	13,490	13.90%	86.10%
Money Advice Service	770	4,298	5,068	15.19%	84.81%
Local Authority & Misdirected	1,697	3,343	5,040	33.67%	66.33%
Customer Relations	357	3,758	4,115	8.68%	91.32%
Investment	3,399	464	3,863	87.99%	12.01%
Customer Details	57	3,769	3,826	1.49%	98.51%
Independent Living Services	536	2,964	3,500	15.31%	84.69%
Universal Credit Support	147	2,852	2,999	4.90%	95.10%
Empty Properties	1,704	850	2,554	66.72%	33.28%
Grounds Maintenance	1,015	1,361	2,376	42.72%	57.28%
Bespoke Lettings	256	1,952	2,208	11.59%	88.41%
ASB	599	1,284	1,883	31.81%	68.19%
Employability	175	1,681	1,856	9.43%	90.57%
Homeless	386	1,049	1,435	26.90%	73.10%
Garden Service	974	258	1,232	79.06%	20.94%
Leasehold Management	219	948	1,167	18.77%	81.23%
Right to Buy or Right to Acquire	602	487	1,089	55.28%	44.72%
Asset Team	860	100	960	89.58%	10.42%
Regeneration	130	778	908	14.32%	85.68%
Sales	200	672	872	22.94%	77.06%
Self Service Portal	216	548	764	28.27%	71.73%
Email Correspondence		672	672	0.00%	100.00%
New Build	123	489	612	20.10%	79.90%
Communal	77	511	588	13.10%	86.90%
Assurance and Risk	74	365	439	16.86%	83.14%
Commercial Properties	86	207	293	29.35%	70.65%
Key Step		224	224	0.00%	100.00%
Customer Involvement	38	167	205	18.54%	81.46%
Trees	75	66	141	53.19%	46.81%
New Directions	10	122	132	7.58%	92.42%
People Team	10	115	125	8.00%	92.00%
Thirteen Care & Support	121		121	100.00%	0.00%
Financial Services	55	35	90	61.11%	38.89%
Concierge	32	27	59	54.24%	45.76%

Cleaning	8	34	42	19.05%	80.95%
Tenancy Support		31	31	0.00%	100.00%
Development Programme	1	27	28	3.57%	96.43%
Open Spaces	19		19	100.00%	0.00%
Contracts and Allocations	7	9	16	43.75%	56.25%
INACTIVE - Void Hit Squad	4	11	15	26.67%	73.33%
Delivery & Construction	4	7	11	36.36%	63.64%
INACTIVE - Relocation Team	10		10	100.00%	0.00%
Financial Planning		9	9	0.00%	100.00%
Feedback Manager / Complaints	1	6	7	14.29%	85.71%
Land	1	4	5	20.00%	80.00%
Grand Total	59,613	251,588	311,201	19.16%	80.84%

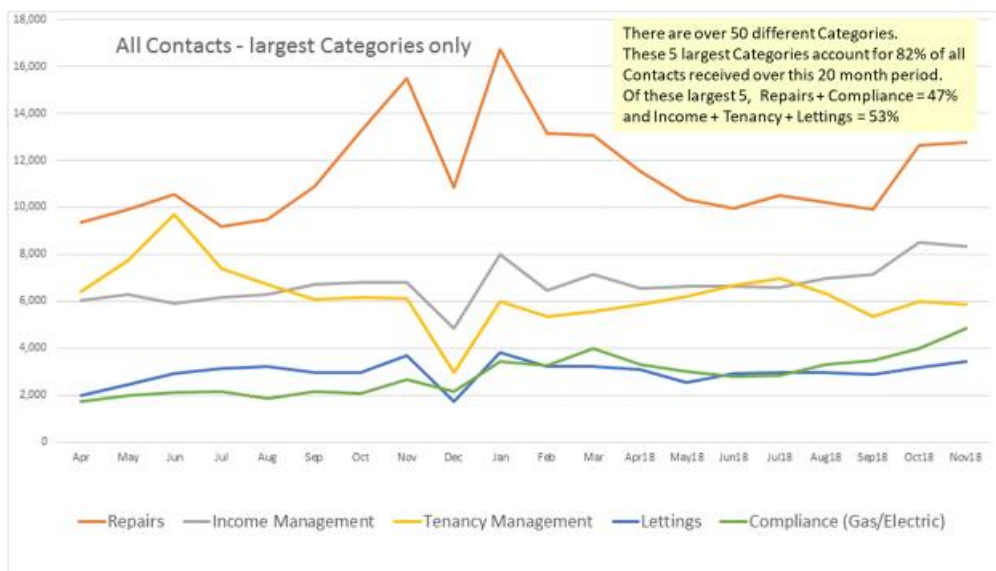
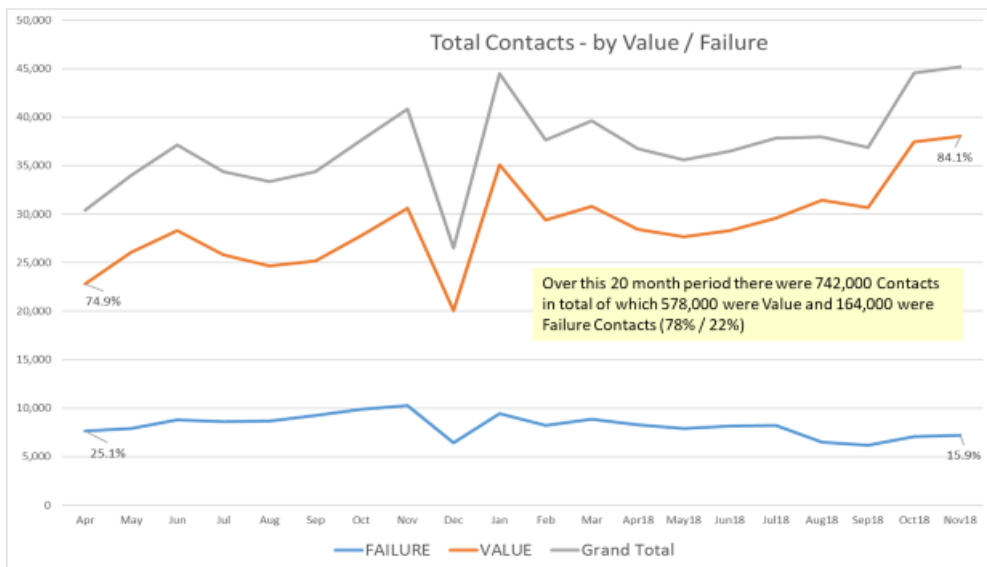
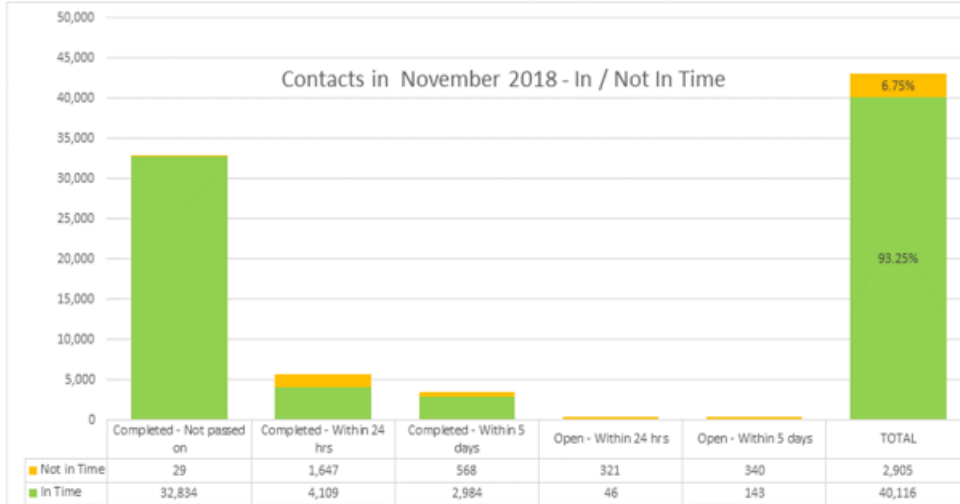
All Contacts 2018-19 (to end Nov 18) - sorted by highest PERCENTAGE of Failure contacts

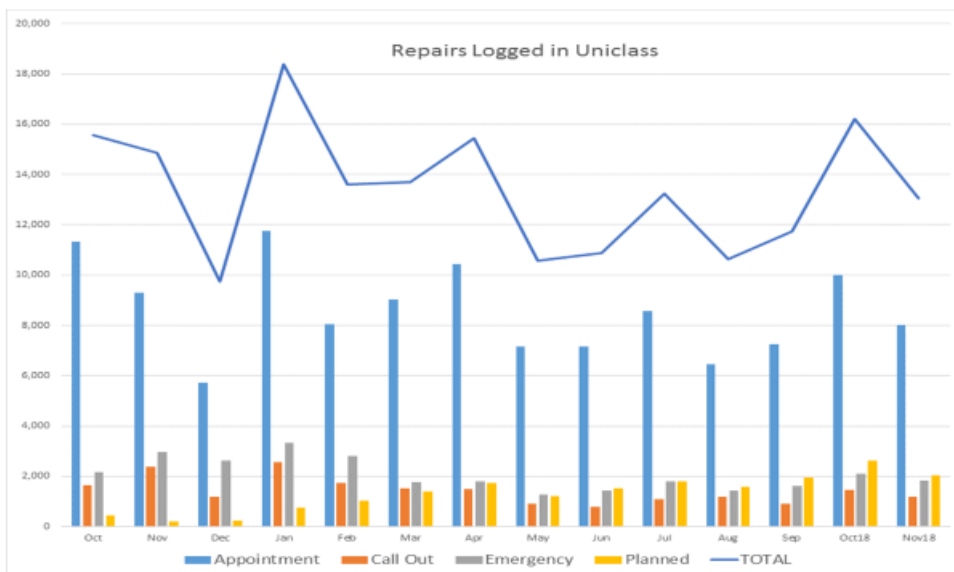
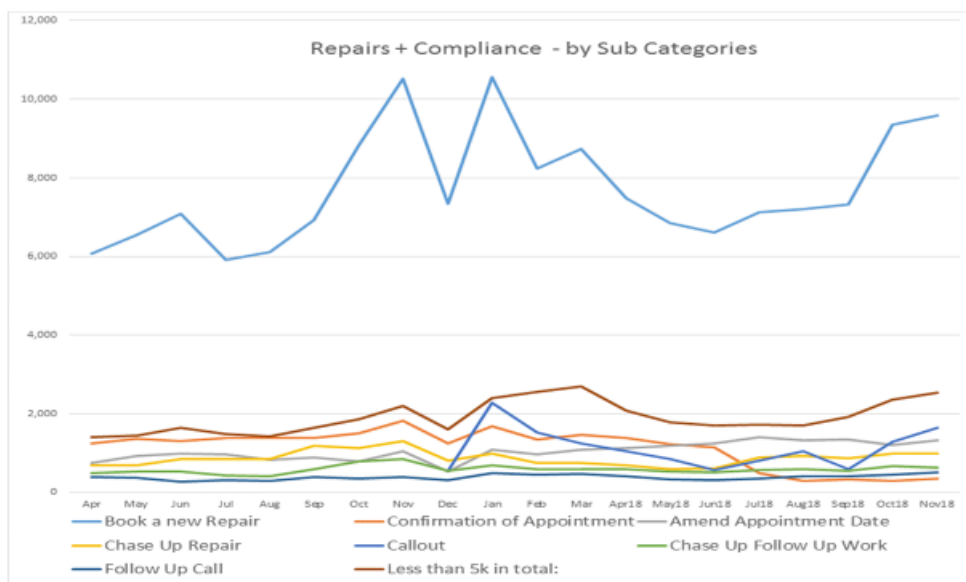
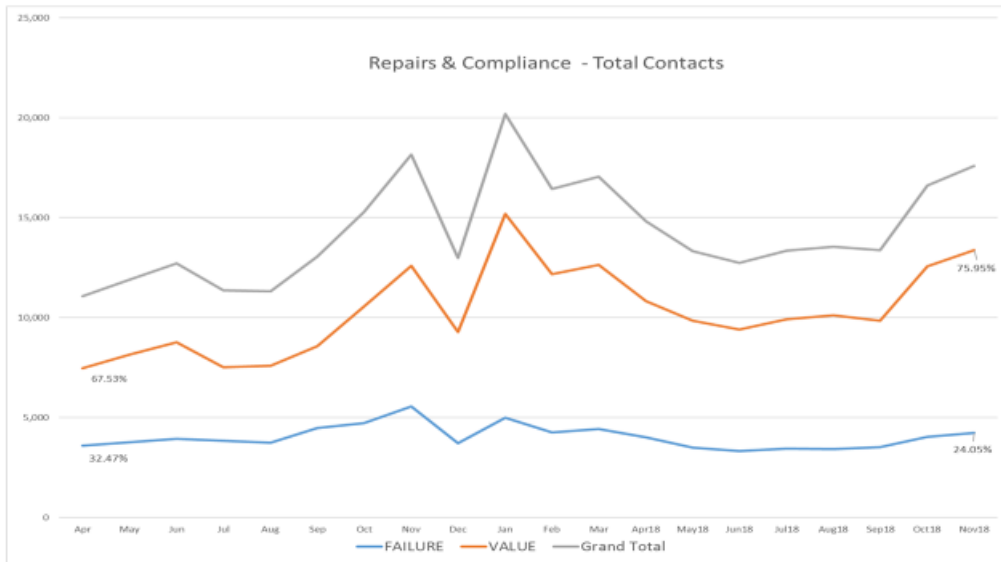
Count of contactID	No.	No.	No.	%	%
Category	FAILURE	VALUE	Grand Total	FAILURE	VALUE
Thirteen Care & Support	121		121	100.00%	0.00%
Open Spaces	19		19	100.00%	0.00%
INACTIVE - Relocation Team	10		10	100.00%	0.00%
Asset Team	860	100	960	89.58%	10.42%
Investment	3,399	464	3,863	87.99%	12.01%
Garden Service	974	258	1,232	79.06%	20.94%
Empty Properties	1,704	850	2,554	66.72%	33.28%
Financial Services	55	35	90	61.11%	38.89%
Right to Buy or Right to Acquire	602	487	1,089	55.28%	44.72%
Concierge	32	27	59	54.24%	45.76%
Trees	75	66	141	53.19%	46.81%
Contracts and Allocations	7	9	16	43.75%	56.25%
Grounds Maintenance	1,015	1,361	2,376	42.72%	57.28%
Delivery & Construction	4	7	11	36.36%	63.64%
Local Authority & Misdirected	1,697	3,343	5,040	33.67%	66.33%
ASB	599	1,284	1,883	31.81%	68.19%
Commercial Properties	86	207	293	29.35%	70.65%
Self Service Portal	216	548	764	28.27%	71.73%
Homeless	386	1,049	1,435	26.90%	73.10%
INACTIVE - Void Hit Squad	4	11	15	26.67%	73.33%
Repairs	23,247	64,603	87,850	26.46%	73.54%
Sales	200	672	872	22.94%	77.06%
Compliance (Gas/Electric)	6,230	21,312	27,542	22.62%	77.38%
New Build	123	489	612	20.10%	79.90%
Land	1	4	5	20.00%	80.00%
Cleaning	8	34	42	19.05%	80.95%
Leasehold Management	219	948	1,167	18.77%	81.23%
Customer Involvement	38	167	205	18.54%	81.46%
Assurance and Risk	74	365	439	16.86%	83.14%

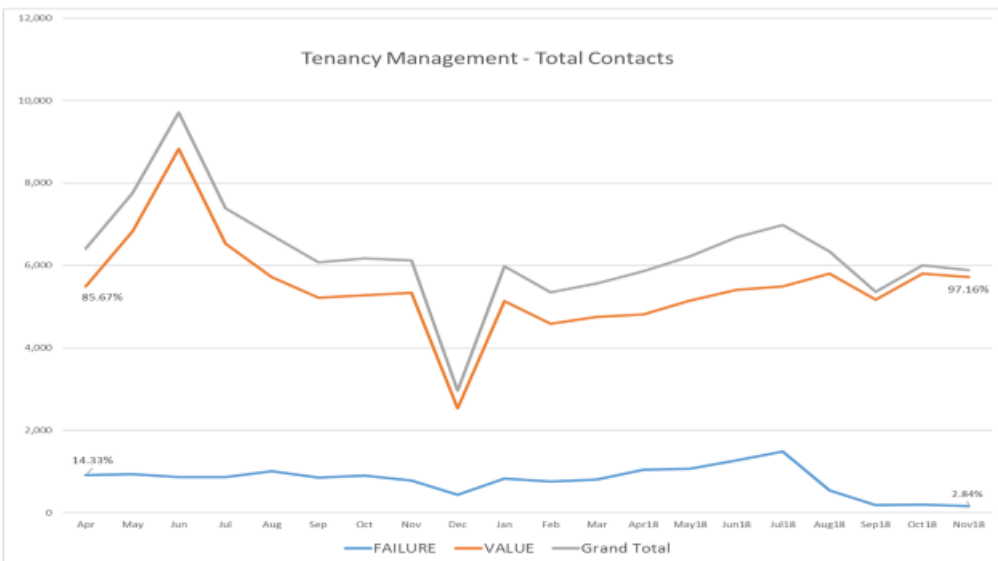
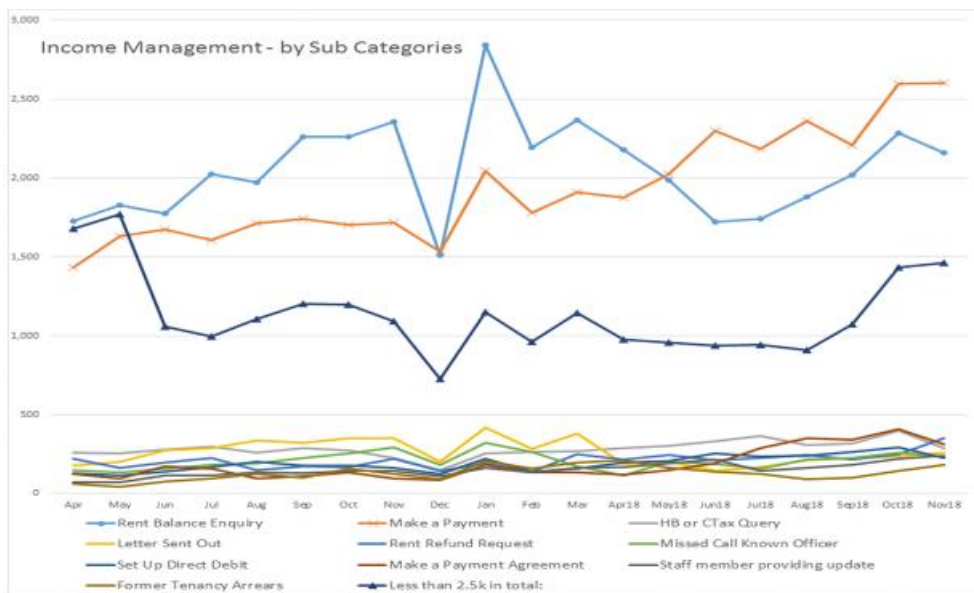
Independent Living Services	536	2,964	3,500	15.31%	84.69%
Money Advice Service	770	4,298	5,068	15.19%	84.81%
Regeneration	130	778	908	14.32%	85.68%
Feedback Manager / Complaints	1	6	7	14.29%	85.71%
Contact Team	1,875	11,615	13,490	13.90%	86.10%
Communal	77	511	588	13.10%	86.90%
Tenancy Management	5,974	43,353	49,327	12.11%	87.89%
Bespoke Lettings	256	1,952	2,208	11.59%	88.41%
Lettings	2,475	21,551	24,026	10.30%	89.70%
Employability	175	1,681	1,856	9.43%	90.57%
Customer Relations	357	3,758	4,115	8.68%	91.32%
Income Management	4,757	52,600	57,357	8.29%	91.71%
People Team	10	115	125	8.00%	92.00%
New Directions	10	122	132	7.58%	92.42%
Universal Credit Support	147	2,852	2,999	4.90%	95.10%
Development Programme	1	27	28	3.57%	96.43%
Customer Details	57	3,769	3,826	1.49%	98.51%
Email Correspondence		672	672	0.00%	100.00%
Key Step		224	224	0.00%	100.00%
Tenancy Support		31	31	0.00%	100.00%
Financial Planning		9	9	0.00%	100.00%
Grand Total	59,613	251,588	311,201	19.16%	80.84%

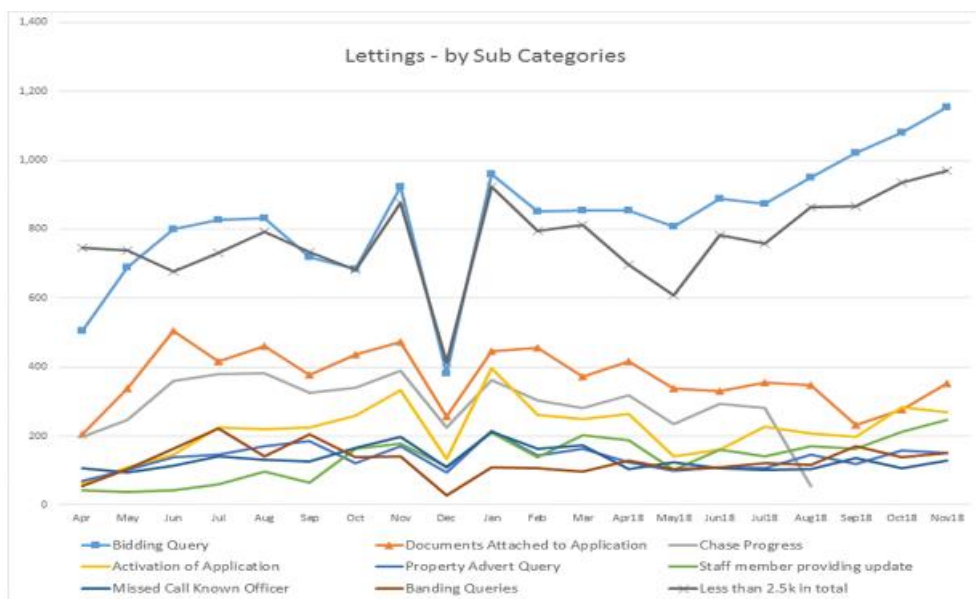
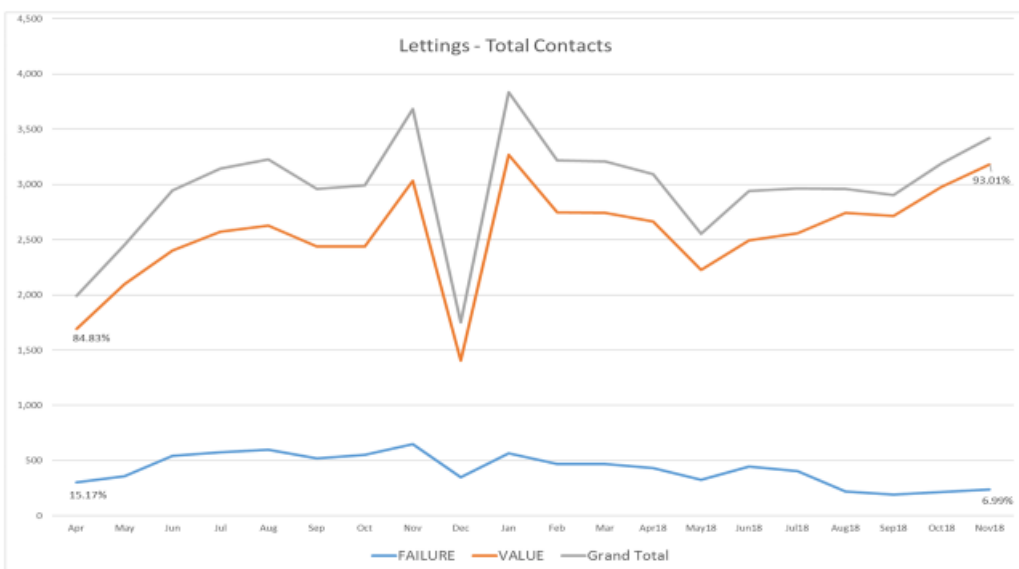
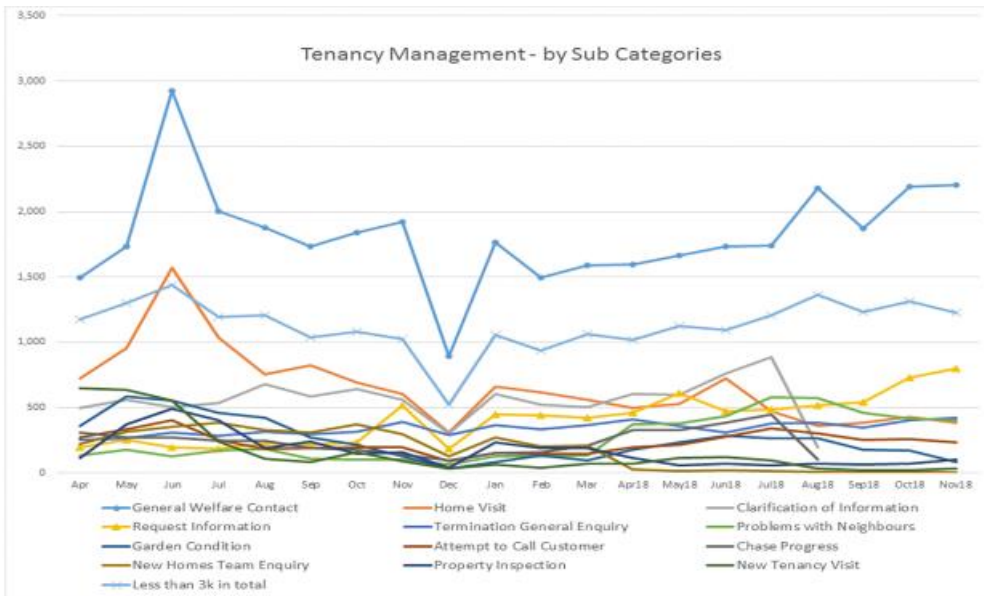
Appendix 2 – Presentation Delivered to In-Depth Review Panel by the Service Improvement Analyst

There were 31,629 calls handled in November (24/7) which generated 43,021 Contacts

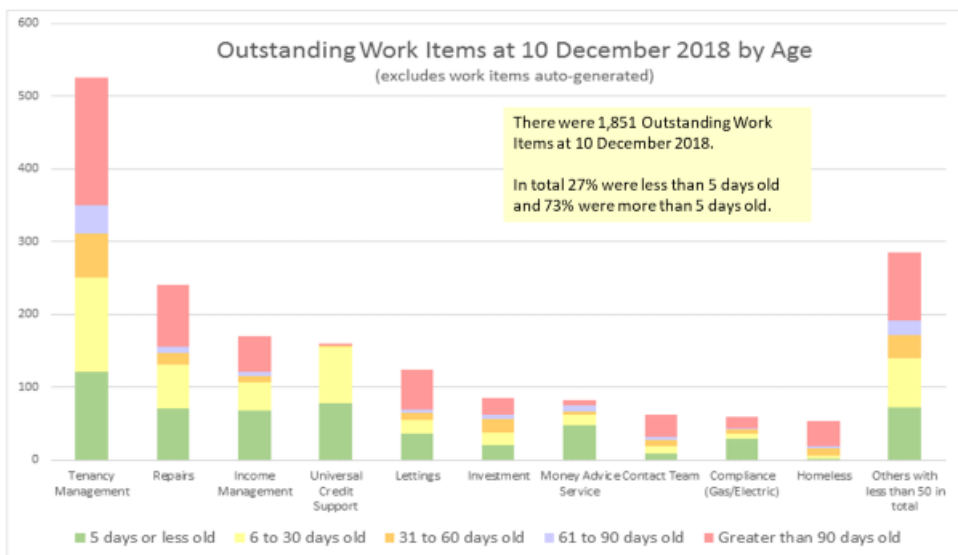
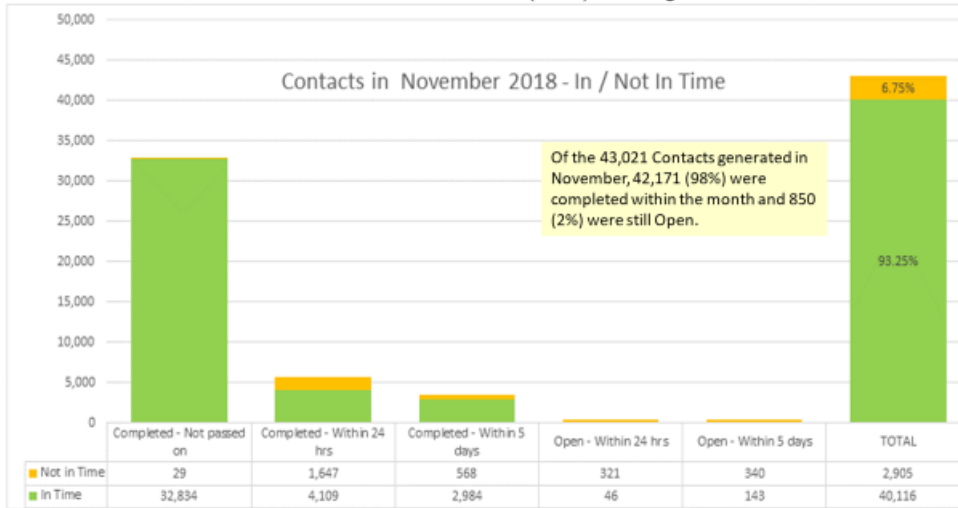






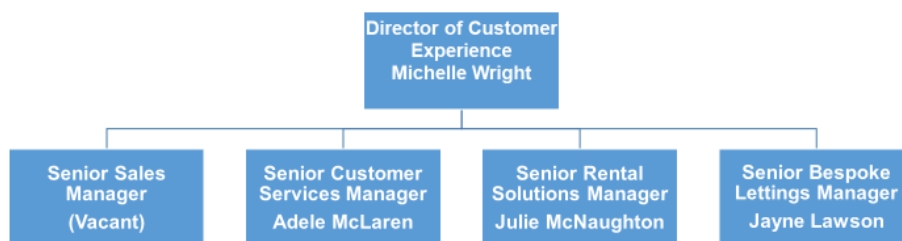


There were 31,629 calls handled in November (24/7) which generated 43,021 Contacts

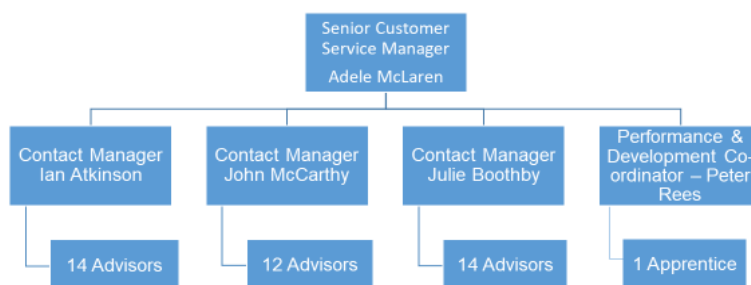


Appendix 3 – Presentation delivered to the In-Depth Review Panel by the Senior Customer Service Manager

Customer Experience - Who does what



Contact Team Structure



- Open 8am to 5pm Monday to Friday
- Extended opening hours pilot since 12 October open 5pm till 8pm
- 1269 calls taken during these extended hours up to and including 1.1.2019


Contact Team – what we do.....

- We won the Brick Award for **Team of the year** !
- Answered **337,118** calls during 2018
- Answered **81%** of those calls within **30** seconds
- Customers waited on average **17** seconds before we answered their call
- Dealt with **76%** of all calls at first point of contact – **Target = 80%**
- Dealt with **25,417** customer enquires via emails within 24 hours
- Provided support with **2,451** customer Self Service enquiries



Performance & Development Co-ordinator – Peter Rees



	<p>Train, mentor and develop colleagues within the contact team to help them achieve and exceed individual as well as team targets in accordance with Thirteens Business Strategy, Vision and Values.</p>
	<p>A bespoke training package has been developed for the Contact Team.</p>
	<p>Regular coaching is carried out with individuals, providing feedback on quality & performance, identifying and addressing further training needs where required to ensure we deliver excellent customer service.</p>
	<p>I am responsible for the training of all new starters on the contact team, carrying out full and competent training of all essential systems, ensuring all staff understand the importance of using Orchard correctly and how logging every interaction plays an important part on how the FPoC and failure demand is reported on.</p> <p>Training is also provided to other service areas within the business when required and or identified.</p>



Failure Demand, what causes it?



Strengths

- We have one system (Orchard) that is accessible by the full company and is an invaluable tool for recording customer interactions, providing updates and confirming/arranging appointments/actions.
- We have a business analysis team that provide each team with reports, identifying issues and areas of focus.
- A dedicated Failure Demand Project Group has been created to analyse the failure coming into the business and create solutions to reduce this.

Weakness

- Orchard work lists are not monitored/followed up by management. - When we don't respond to call backs or Orchard work items within timescale this is letting our customers down and creating avoidable contact (failure).
- Certain modules within Orchard don't talk to each other i.e. the rents notes and main dashboard do not copy information across, requiring the checking of two separate areas of Orchard for the required information.
- Not keeping the customer updated on progress, even if the query is not fully resolved, updates are essential in preventing avoidable contact.
- When we don't communicate efficiently within the business and are not utilising the Orchard CRM system. (not recording vital communications/interactions) not all staff are using Orchard.



Failure Demand

Failure Demand – The failure of actions not being completed as agreed or within the specified time scales resulting in the customer having to contact us more than once regarding the same query.

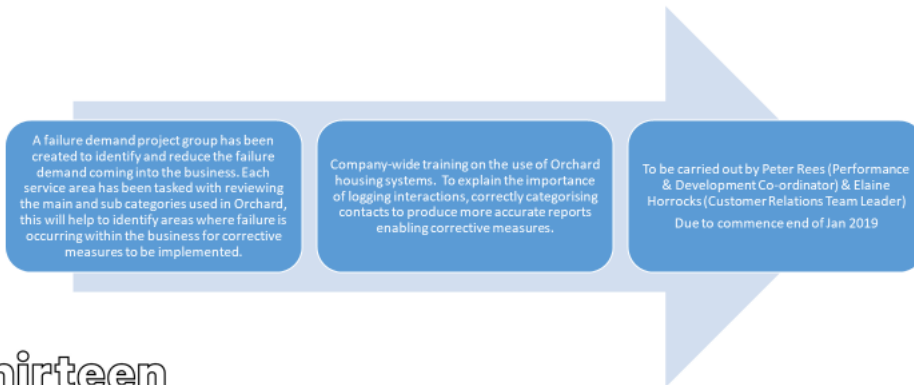
2017 was over 30%,
Currently 15.57% as of 31.12.018
The future target is 10%.



- Reduced by analysing reports and identifying areas where high failure is occurring and introducing corrective measures to resolve. This is strongly reliant on everyone using the Orchard Systems correctly.
- We work closely with the service areas identified and address the issues with high failure demand, (Tenancy management, Income management & Repairs & Maintenance).
- As a result of this analysis and collaboration we have introduced new processes to further achieve our goals.
- Actions are now being processed in a more timely manner contributing to the 10% target.



Failure Demand, Where we are going



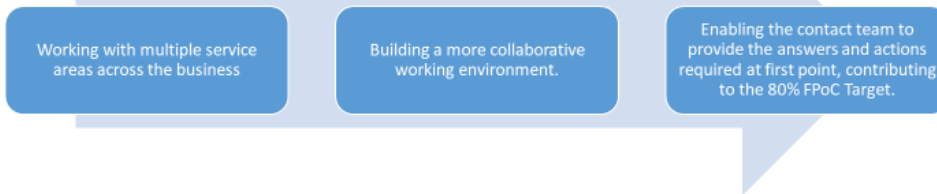
First Point of Contact - FPoC

FPoC - Is correctly and fully addressing the customer's need the first time they contact, thereby eliminating the need for the customer to follow up with a second call.

Lowest June 2018 at 73.31%

Currently at 78.84%

Target 80%



Continuous work and analysis is carried out by the Contact Managers, Performance & Development Co-ordinator and the Service Improvement Team to understand and help implement more efficient, smarter ways of working to further our FPoC and achieve our targets. All of which helps us to deliver excellent customer experiences.



FPoC –



Strengths

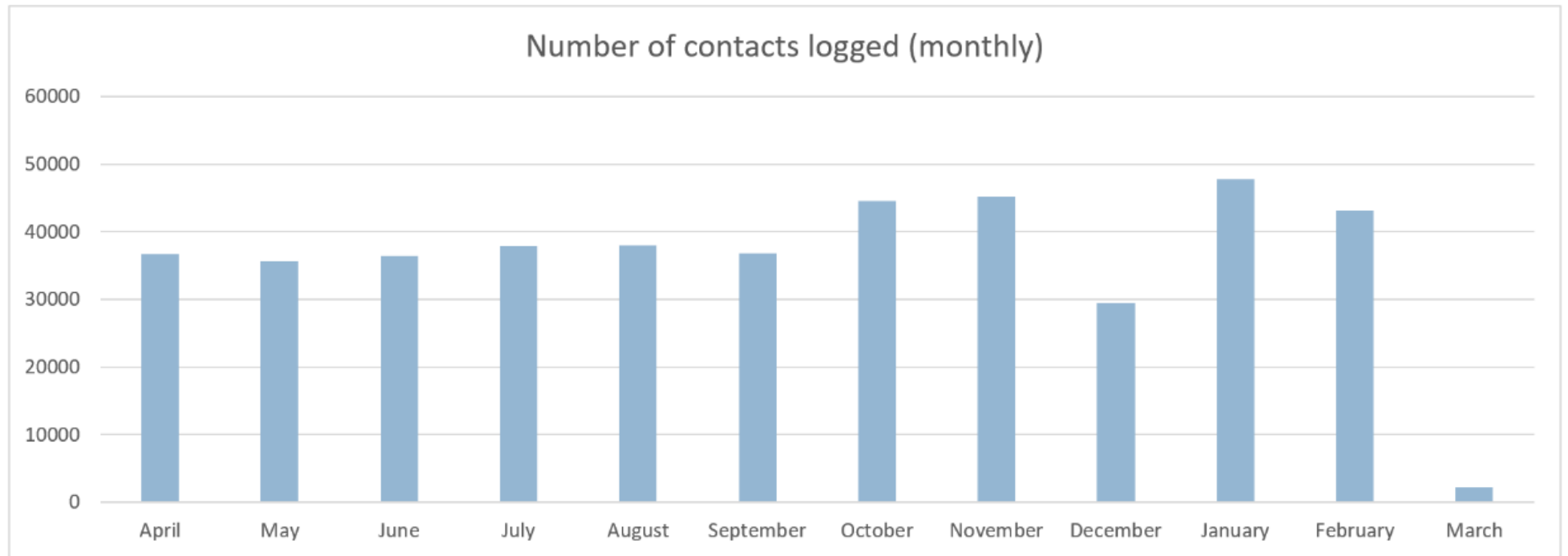
- We have one system (Orchard) that is accessible by the full company and is an invaluable tool for recording customer interactions, providing updates and confirming/arranging appointments/actions.
- OneNote – We have adapted Microsoft OneNote to be our main hub of up to date information, we continuously update this file with the latest changes/alterations/business updates that are available. This is utilised by the full contact team as a directory of knowledge, work is ongoing to create a company wide version enabling other service areas to take advantage of this "fountain of information".
- Monitoring & Coaching by the Performance & Development Co-ordinator is helping to identify areas of improvement assisting us to reach our 80% FPoC target.
- Effective collaboration between other service areas is helping to gain knowledge to help contact deal with queries at FPoC and reducing the need to delay a customers resolution.

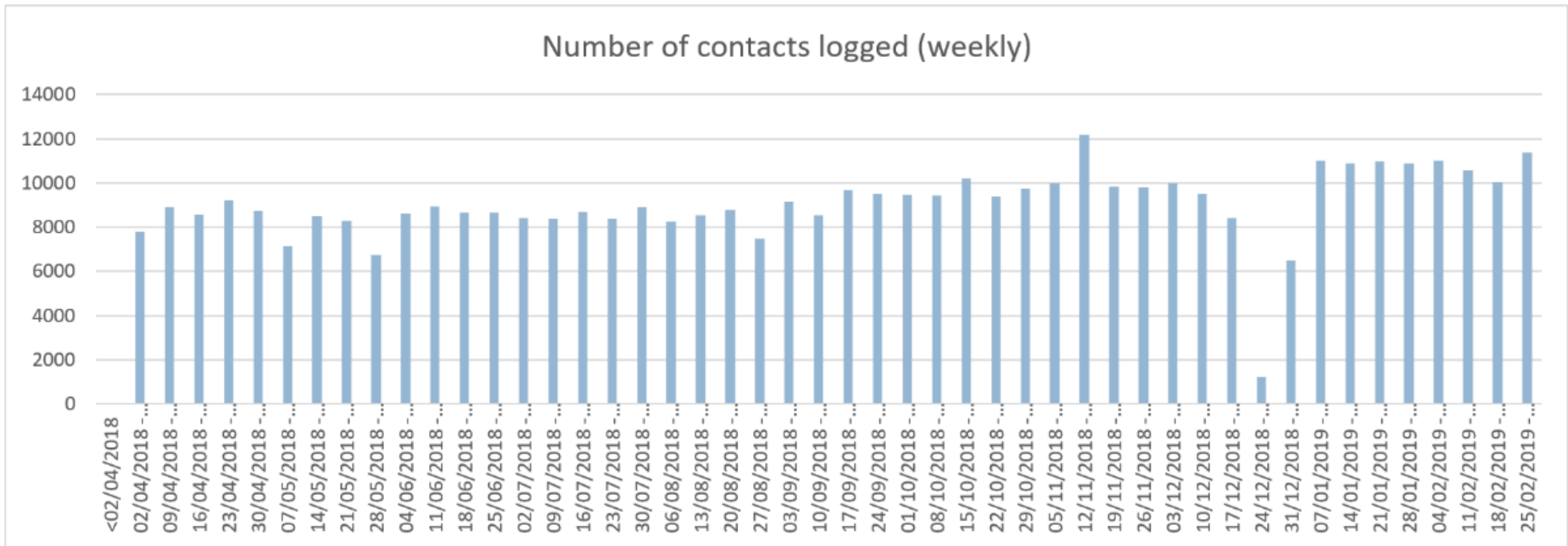
Weakness

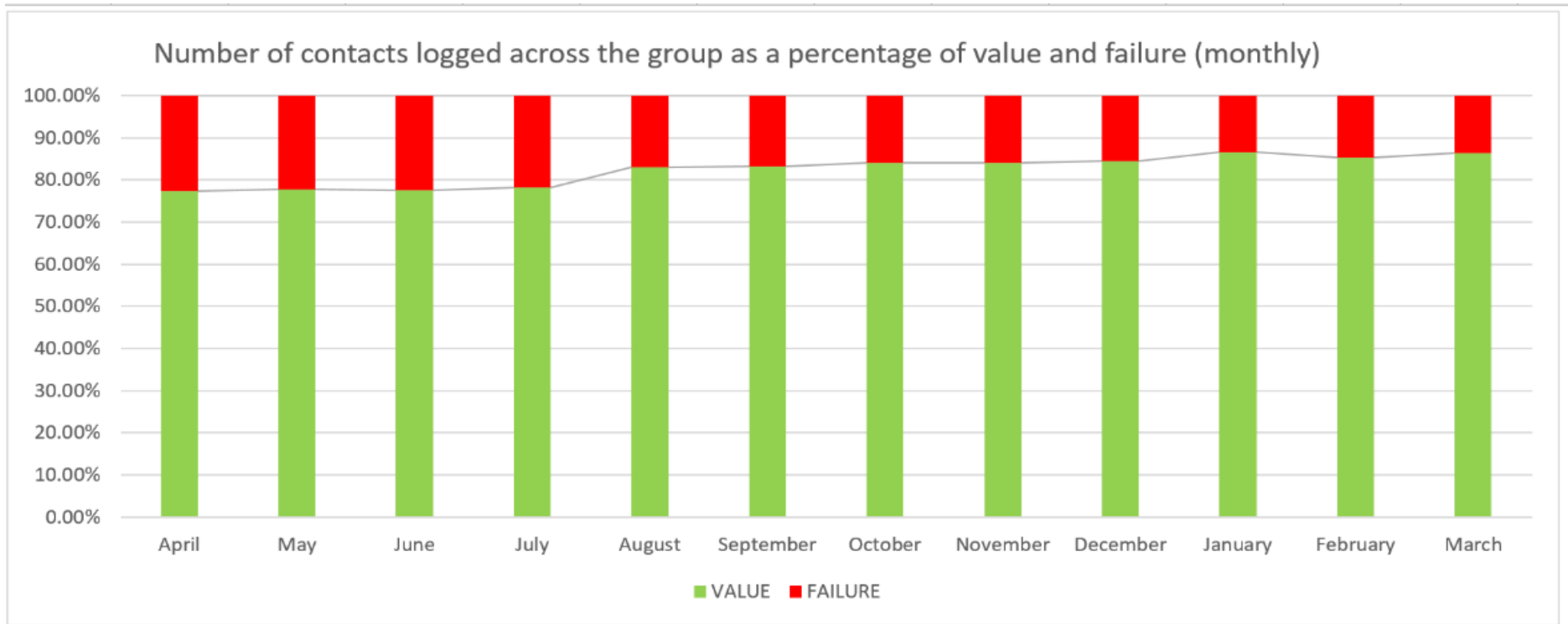
- Other service areas not using Orchard systems when communicating with customers, preventing first call resolution due to lack of information entered on the system if the customer should enquire about that previous interaction.
- The lack of available information provided to contact when new projects/schemes are starting. E.g. investment work, a customer can call for more information on this program and if the info has not been shared with Contact then we are unable to resolve at first point and rely on sending the query to another department.
- The inability to complete complex or sensitive tasks at FPoC due to the nature of the query. E.g. High level ASB, Court Action due to arrears level, Tenancy termination due to forms needing to be signed.



Appendix 4
Information as at 3/3/19







Number of contacts logged across the group as a percentage of value and failure (weekly)

