

Executive Summary

The Resident Scrutiny Panel reviewed and assessed Phoenix's call handling. This involved understanding what call handling means, the different techniques that can be used and assessing the quality of the call handling. We also reviewed the role of the Contact Centre and Front of House Advisors.

Introduction & Background

The Panel selected this topic because they wanted to find out more about how telephone calls to the Contact Centre were managed.

The success factors for the review were to:

- Investigate and identify different call handling techniques
- Understand what call handling means
- Identify and assess the different methods for establishing the quality of call handling
- Understand the role of the Contact Centre and Front of House

Methodology

The Panel began the review by requesting key documents and carrying out a desktop review. The following documents were requested:

- Introduction to the Service Area
- Call handling techniques
- Contact Centre (call handling) & Front of House Performance – last three years
- Phoenix Service Standards

To support their understanding of the review, the Panel also interviewed

- The Customer Services Manager
- Head of Housing

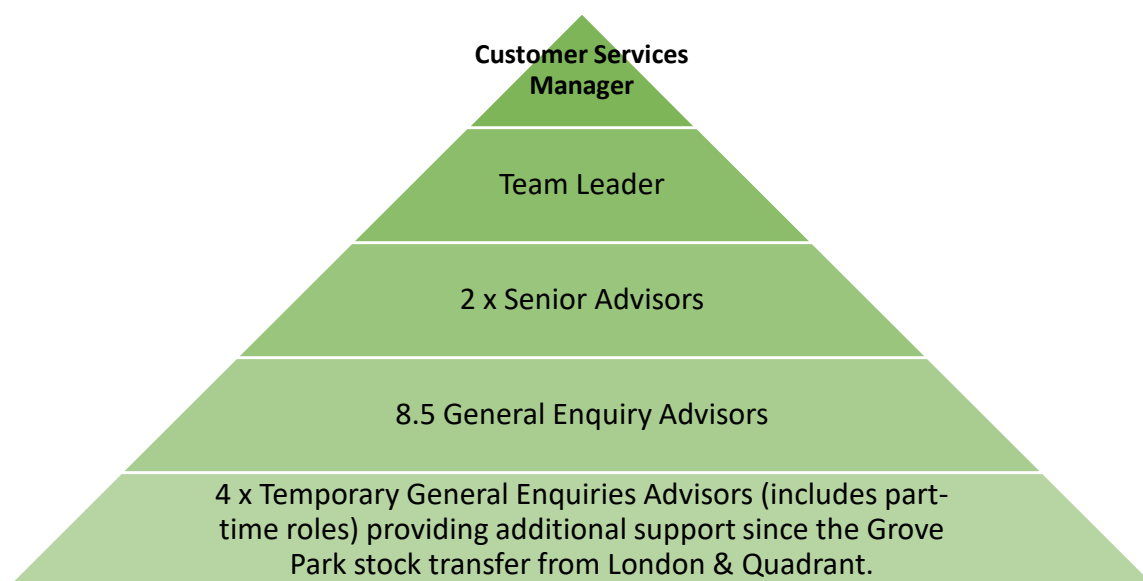
Findings & Conclusions

Overview

The role of the Customer Services Team is to manage:

- Contact Centre (taking incoming telephone calls from residents)
- Front of House (dealing with face-to-face queries from residents who visit The Green Man)
- Open, log and respond to incoming correspondence sent by email or scan documents received through the post.
- The online resident portal.
- Respond to follow-on queries handed over from the Out of Hours service.

The team are made up of 18 members:



The function of the team has changed and can be categorised as pre and post pandemic functions.

Pre-Covid	Post-Covid
Restructure in July 2019 splitting the everyday repair function from Phoenix Repairs Service (PRS) into the Contact Centre. Two additional members of staff were added to the team.	Rollout of Contact Centre being able to work from home -offering hybrid working and flexibility

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August 2023



Pre-Covid	Post-Covid
All calls were channelled through the Contact Centre	Option for training to be carried out virtually
Skill setting utilised for Repairs and General Enquiries	Utilising of part-time roles for peak time flexibility: 10am – 2pm and 1pm – 5pm
Launch of CRM July 2019 – Contact Centre are primary users	Launch of the resident portal in April 2021
Contact Centre working in the office – offering no flexibility	Grove Park stock acquisition November 2021
Introduction of additional shift starting at 8:30am	Procurement of new Out of Hours Provider – launched in February 2022
Bi-weekly team meetings	One team integration so that both the General Enquiries and Front of House roles are interchangeable and can cover for each other.
Focus on improving knowledge base of team so increased training sessions including bespoke training sessions.	Support person as well as person in the office available on a rota basis daily to monitor performance.
	Introduction of weekly team meetings
	Roll out of training videos
	Team WhatsApp group is launched during Covid and is currently used to provide staff support.

Findings

Overall, call handling techniques at Phoenix means that the majority of queries are resolved by the Contact Centre Advisors. This means that the Advisors wherever possible try to respond to and resolve the resident's enquiry whilst they are on the telephone without the need to transfer the call to wider Phoenix teams or several members of staff. The Advisors have a broad script to give them an outline of the information they need to provide and ask residents (for example, identity validation checks to confirm that the resident is who they say they are).

The Customer Services Manager, Team Leader and Senior Advisors regularly assess call handling by listening to calls, assessing the quality of the advice provided using checklists and monitoring resulting cases logged.

The Contact Centre and Front of House roles are generic roles dealing with general Enquiries. Staff in these areas have preference and skill sets for specialist areas (repairs vs general enquiries). Staff maintain skill sets and further develop their knowledge area through ongoing learning and training development.

We noted there has been lots of improvements with Call Handling, especially with ongoing training to support staff in their role.

The team have lots of well-planned and documented procedures that help them to resolve issues residents raise during telephone calls. We have a greater understanding of the detailed work that the Contact Centre have to do. It is not just answering phones but dealing with all the post that comes into the business. Support is also given to residents by phone to help them use and navigate the online portal. The team also process email correspondence and ensure cases are allocated to the right members of staff.

Within the team there are knowledge champions with staff 'championing' different service areas and expertise to provide additional support with queries. A buddy-system is also in place to help newer team members with their day-to-day work.

During Covid, the team had to adapt and respond to different working practices during the pandemic. This worked well and the team have continued to work from home four days a fortnight.

We observed the activities in the Hub area shortly before one of our panel meetings was due to start, we found that the location of the Concierge desk does not provide a good service. There is not a meet and greet service and security do not have good views of the car park and entrance doors. We also felt that the Hub area does not give sufficient privacy for residents to discuss their personal issues and finances. We really like the play area for children in the Hub but also felt that the area needs to be appropriately sited (possibly near the window in front of the Credit Union) and zoned off to prevent disturbance to others.

We looked at performance over time and noted that factors such as staffing levels and extreme weather conditions can have an impact on call handling performance. Additionally, the Covid-19 pandemic largely affected the service performance, for example visits to The Green Man were impacted by lockdowns and local restrictions. Pre-pandemic performance for visits to The Green Man are not expected to return as residents use a wider variety of ways to contact Phoenix.

We found that telephone contact remains the most common and favoured type of resident contact. In 2021-22, 15,275 cases were logged via telephone contact.

The Resident Portal was launched in 2021-22 and enabled residents to make contact, report repairs and check rent accounts (among other features). We found that the facilities provided by the portal are limited and need to be developed. So far, 27.36% of Phoenix households have signed up to use the portal.

Findings from the Head of Service Interview

From our interview we found that the Head of Housing Management has a complete understanding of the service and improvements that are needed. There is a clear understanding of his role and responsibilities and that of his staff.

A key finding from our interview is that it is important to be realistic about how quickly phone calls and emails can be returned to residents due to the high volume and complex nature of work.

There is now a new Out of Hours provider that is working well and providing good value for money. Plans for improvement include the Out of Hours provider having integrated access with CRM so that the contractor can view Phoenix systems.

Some areas of the portal are still being developed and that Phoenix are digital by choice meaning that residents can choose how they want to contact Phoenix.

We noted that there has been an increase in vulnerable residents presenting to Phoenix since the pandemic, this has also been driven by cuts to local support services and as a result, residents are turning to Phoenix.

Conclusion

We noted there has been lots of improvements with Call Handling, especially with ongoing training to support staff in their role. Phoenix uses a 'done-in-one' technique for call handling, meaning that the Contact Centre Advisor tries to respond to and resolve the residents query during the call without the need to transfer the call to other members of staff. Staff complete a detailed training programme as part of the induction process before they answer live telephone calls and training is regularly reviewed and ongoing to ensure staff develop and are supported.

More widely, there are several Transformation Projects in progress for the Customer Services area to help improve the service residents receive. This includes moving the repairs service in-house (this was completed at the beginning of April), Customer

Journey Mapping Workshops to improve resident experience, Appointment Scheduling, Out of Hours system integration and a new telephony system.

Recommendations

We have made some recommendations based on the findings in our review which we feel will help improve the service residents receive:

- Concierge to work more closely with the Front of House Team.
- To review the follow-on process for repair appointments.
- Contact Centre Advisors should have greater visibility of complaints within the CRM system to assist and support with complaints handling at first point of contact. Staff should consistently contact residents at Stage 1 of the complaints process and keep them informed about the progress of the complaint.
- Concierge desks need to be swapped around (high desk facing the windows and low desk facing main Hub area) so that staff can monitor residents entering and exiting the building creating a clearly signposted helpdesk for any visitors. Improving meet and greet service.
- Concierge to have access to meeting and event schedules taking place at The Green Man.
- For Contact Centre Advisors – maximise opportunities for staff learning through sharing experiences.
- Expand services available through the online portal and make it easier to navigate.
- Improve communication to residents when the telephone lines are down and need to switch over to the Out Of Hours Service. For example, communicate through the flyer, website, social media platforms such as Twitter.
- Review the types of repairs that can be reported through the online portal.
- Explore the use of Privacy Pods in the Hub area.
- Explore furniture to zone off children's area in the Hub.

Constraints

We would have liked to have seen the Contact Centre Advisors in action but due to Data Protection and Confidentiality reasons this was not possible.

There are several Transformation Projects in progress for the Customer Services area, this includes moving the repairs service in-house (this was completed at the beginning of April), Customer Journey Mapping Workshops to improve resident experience, Appointment Scheduling, Out of Hours system integration and a new telephony system.

Next Steps

We would like to have some more training to support us in our role:

- Scrutiny review refresher training
- MS Teams and digital training (email, using word documents).

Our next review topic will look at Financial Wellbeing.

Lessons Learnt

We were surprised at the depth of involved work by Call Handlers & Front of House staff, the level of training provided to staff during the induction phase and ongoing training.

We assumed that the team just answered the telephones. We also thought that the Concierge and Front of House were one team but through the review found that they are in fact two separate teams. There is a series of ongoing reviews being completed to improve services.

The Scrutiny Panel would like to commend the team for all their hard work and ongoing work