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| **Deep Dive – Complaints – Scoping Session 2**  held on Friday 26th April 2024  at Emperor House Board Room | | | |
| **R** | | | |
| **PRESENT** | | **IN ATTENDANCE** | |
| Brenda (**BN**)  Jane **(JS)**  John **(JD)**  Jim **(JL)**  Doreen (**DR**)  Angela (**AD**)  Dorothy (**DD**)  Diane (**DC**)  Michelle (**MW**)  David (**DW**)  Brian (**BT**)  John (**JM**)  David (**DB**)  Evelyn **(EC)**  Vivienne (**VD**)  David **(DB)** | | Lewis Walmsley (**LW**) – Customer Engagement Lead  Susan Fulton (**SF**) – Exec Director of People, Culture and Engagement  Zoumiya Kouache (**ZK**) – Business Analyst  Ian Walton (**IW**) – Planning & Business Services Operations Manager  Jacqueline Hails (**JH**) – Contact Centre Operations Manager  Natasha Hill **(NH)** – Contact Centre Advisor  Michael McGuigan (**MM**) – Complaint Performance Manager  Kerry Leng (**KL**) – Director of Marketing & Engagement  Susan Fulton **(SF)** - Executive Director of People, Culture and Engagement. | |
| **APOLOGIES** | |  | |
| Stephanie (SC)  Melvyn (MT)  Susan (SC) | |  | |
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| **PARA** |  | | **ACTION** |
|  | 1. **Introduction to Session** | |  |
| 1 | LW offered thanks to everyone for their attendance and completed a round of introductions.  LW advised following on from the scoping session, the group wanted to look at informal complaints and requested an insight as to how the contact centre and salesforce operates which will be discussed and explained today. | |  |
|  | 1. **Salesforce Overview** | |  |
| 2 | ZK advised of her role as Business Analyst, what this role entails, and what we can do together to make change for the better.  ZK offered overview of how Salesforce works, how contacts are logged and how contacts can be viewed from all departments. ZK explained salesforce is a CRM system and many businesses use this, for example Banks etc. ZK explained the idea behind Salesforce is that it brings all IT systems together as one, therefore this is a good solution to connect the dots and be a faster process for issues to be actioned.  ZK logged into Salesforce (displayed on screens around the Boardroom) demonstrated how cases are logged and how easy it is to pick back up at any time, using the ‘search’ function. The ‘search’ function can be a name, telephone number etc, and will provide information regarding the customer.  ZK also demonstrated how we can search cases via ‘key words’ this will search the system for any cases with related key words.  JH advised how the processes and procedures work within the contact centre and how they can locate the cases. JH also advised the contact centre are still using several systems until Salesforce is fully functionally.  JD asked if he missed a call from Gentoo and no message was left, could the contact centre find out who called him. JH advised a contact would be logged on the customers account, so those colleagues with access to the system would be able to view who called him.  DB asked how long Gentoo were from total functionality just using Salesforce and not all the systems. JH advised there was not a specific date, however we are well on the way to converting over to only using Salesforce.  MW asked if that mean calls take longer to process, with staff using multiple systems. JH advised it does slightly, as it is a lot of copy and paste form one system to another.  ZK carried on with demonstration of Salesforce – explained user defined characteristics (UDC’s) and how this information helps us deliver a better service.  BT asked if all UDC’s are permanent. ZK advised they are reviewed by the housing teams and can be easily updated. LW advised we can add and remove UDC’s as and when required.  JD asked if the information on the UDC’s are shared with contractors? For example, a customer may have a vulnerability which causes them to take longer to answer the front door. LW advised this would be checked and will provide feedback [1]  DR asked why the test system is not fully populated. DR advised it should be with it being a test system to give full demonstration. ZK advised it is, however for the purposes of this demonstration made up data has been created to ensure the group do not breach GDPR.  BT asked if Salesforce held customers next of kin (NOK). ZK advised it is and how this can be located within the system. BT asked if we could check his account. LW advised BT to ring in and we can check to see if his own NOK is on the account.  ZK advised how a contact is easily added (for example, if a customer calls to amend a Gas Service appointment). JH explained outbound calls are logged in this area also.  ZK advised the need of raising a case, either creating a task for yourself, or to pass to a colleague for them to investigate.  JH advised when we raise a case, it can be allocated to a different colleague if it was something that could not be answered straight away by the operator.  NH advised how the system has different priority levels depending on the seriousness of the query. This means colleagues have a service level agreement in which they need to respond to the customer.  JD asked how the system is connected to the repairs system and will it be all one system once Salesforce is fully functioning. ZK advised this would be the case and gave a quick demonstration.  DR asked once a case is assigned to another person, is the member of staff who assigned it, still tracking it. JH advised they would not, however if the member of staff who has been assigned the case does not action it within the allotted timeframe, their line manager will be informed.  BT asked how we prevent certain information being given out, for example on a Anti-Social Behaviour case? ZK advised that this kind of information is held securely on another system, however, it will be on Salesforce with permissions in the future, therefore only permitted colleagues will be able to view the information.  DC asked if Salesforce would accept a picture along with email if trying to explain a repair, as some customers find it difficult to explain repair issues. JH advised this is possible, and a lot of the time it is easier for our teams to identify the problem as they can physically see what the issues are. LW also gave an example of how this has worked efficiently.  DR asked if the group have bought into their full capability, or just it a case of as and when we need? JH advised we do have capability to use all of the standard system, and there is a lot of functions that are not yet used.  BN asked if the group work with colleagues to hear feedback regarding the system. ZK advised the group have a set of colleagues called ‘Trail Blazers’ who feedback information regarding how the system can be improved.    ZK demonstrated how to raise a Damp & Mould case, provided information on how we can try to resolve issues before being raised to a formal complaint, and how we transfer the Damp & Mould cases over to the Case Management Team. ZK advised how we can create a task, how the task changes colour with time, and how the owner of the case gets a reminder when tasks are upcoming  MW asked if this system will reduce complaints. ZK advised that is the hope, as we do receive complaints regarding how long it takes from reporting to the fix. JH advised from a volume perspective, the calls for Damp & Mould are not that high.  MW asked if the system leaves a footprint with regards to all interactions. JH advised Salesforce is only as good as the information inputted into the system. JH advised her team listen to calls, making sure there is a footprint for each one of the calls received, therefore this tallies up onto the system.  BT asked would everything be logged. BT provided example of a plumbing issue he recently reported. He explained the trades person asked if he could come back to replace taps the following day even thought they were on the van? LW will look into issue [2]  DR asked if Gentoo staff have the Salesforce training by Salesforce themselves. ZK advised Salesforce did train some colleagues initially, then we rolled it out with colleagues ourselves.  JD stated the system appears to be brilliant, however the breakdown is between the depot and trades going out to do the actual job, as a lot of the time, the trades person does not have the tools. ZK stated, going back to what JH stated earlier, hopefully in the future, the video calling, or photographs could avoid this.  BT asked when a tradesperson attends, is it not logged on his handheld, then put straight onto another van for them to attend the next day. IW advised we are currently looking at ways to improve the way this process works.  DR does the system right now have the capability to see what stock is used in each area so when trades go out, they know what they should be carrying on the van. ZK advised we have got capability to do this, however, when we add elements to Salesforce, we prioritise which one adds the most values to the customer first. | |  |
|  | 1. **Contact Centre Overview** | |  |
| 3 | Due to time constraints this was removed from agenda. | |  |
|  | 1. **Complaint Figures & Themes from Q4** | |  |
| 4 | MM offered complaint figures:   * Q3   Stage 1 = 94 Stage 2 = 27  Agreed extension deadlines = 32%   * Q4   Stage 1 =105 Stage 2 = 36  With timescales of 100% across both stages  Agreed extension deadlines = 13%  MM advised he is confident we are moving in the correct direction.  MM offered the top 3 complaint themes:   * Repeat Repairs * Delays to Damp & Mould follow-on works * Poor communication following on from inspections.   VD have some of the above escalated to the HO? MM advised that some would have, however doesn’t have the exact figures currently. [3]  Bill asked how many customers Gentoo have. LW advised that it was just over 30,000. It was general consensus amongst the attendees that the figures were great when you look at the comparison of how many customers Gentoo have compared to complaints received.  DR asked why we have so many complaints escalate to stage 2? MM will look into this and advised he has already started a review [4]  BT asked if we receive the most complaints on a Monday as he always has difficulties on a Monday morning? JH advised that a Monday morning usually receives around 29% of the full weeks’ calls.  DC advised that miscommunication is a huge issue, especially for new customers.  MM advised that it starts at the very beginning of a customer’s Gentoo journey.  LW asked if there was anything else to discuss at this time? Nothing raised. | |  |
|  | 1. **Self-Assessment against Housing Ombudsman Code** | |  |
| 5 | LW advised of the Housing Ombudsman Self-Assessment form and explained the team are required to follow this to ensure compliance with complaint handling.  LW asked attendees if they would review this if a session was to be arranged in-person. KL advised this is a live document, therefore needs to stay in house.  LW advised, we want to be able to assure the Housing Ombudsman as well as our customers that this has been reviewed with customer involvement. It was agreed to host a session on Wednesday 1 May between 12:00pm – 15:00pm  LW to send email following the session, with confirmation. LW will send info to Bill, therefore it is accessible for DD [5]  SF introduced herself and the area of the business in which she is responsible for. SF advised we would like attendees’ input, as the purpose is not to say we handle complaints brilliantly, however, it is about ensuring we have got the policies in place, how we handle complaints, how our customer are contacting our services. SF advised slides will be created for next week’s session.  DC commented complaints usually start with a phone call, get that wrong then it can create complaints. AD advised the Lettable Standards should also be looked at. [6]  JD advised it is important to see the reasons why complaints escalate to stage 2 and look at how many went to the Housing Ombudsman and if this has increased from Quarter 3. JD would like to know figures before the next Committee Meeting on Wednesday 22 May. [7] | |  |
|  | 1. **Complaint Drop-in Sessions** | |  |
| 6 | LW advised we are looking at trialling complaint drop-in sessions next month.  LW advised this will allow customers to come in and talk to us about issues they may be experiencing.  Attendees advised different times for the sessions should be offered such as out of hours.  LW advised he would like the attendees to attend these drop-in sessions and provide feedback at the next deep dive session. | |  |
|  | 1. **Next Steps** | |  |
| 7 | LW advised the Regulator of Social Housing will be attending the next session and an agenda will be created and distributed closer to the time. It was explained to all attendees if they could stay behind at the next meeting so the Regulator can gather their thoughts and views. All agreed with this.  Next Meeting: Thursday 30 May – 10:00am – 13:00pm (12:00pm – 13:00pm will be with the regulator where you will be providing feedback) | |  |

**ACTION LOG**

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| **KEY** |  |  |
|  | Action completion overdue |  |
|  | Action ongoing and date not due |  |
|  | Action complete |  |

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| **ACTION REF** | **DETAILS** | **RESPONSIBILITY** | **TARGET COMPLETION** | **STATUS** |
| 26.04.24 - [1] | Is the information on the UDC’s shared with contractors? | Lewis Walmsley | 31.05.24 | R&M have confirmed all UDC’s are checked on addresses when raising external orders. |
| 26.04.24 - [2] | Look into BT’s concerns with regards to plumbing appointment. | Lewis Walmsley | 31.05.24 | This has been investigated and feedback provided to BT. |
| 26.04.24 - [3] | Can figures be provided with regards to how many complaints have been escalated to Housing Ombudsman in 2023/2024 | Michael McGuigan | 31.05.24 | Michael to action this and communicate via Customer Committee |
| 26.04.24 - [4] | To investigate why so many complaints are being escalated to Stage 2 and what preventative measures can be put in place. | Michael McGuigan | N/A | This will be monitored through Q1 of 2024/2025 |
| 26.04.24 - [5] | Lewis to send all minutes and future meetings to Bill for DD | Lewis Walmsley | 31.05.24 | This has been agreed with DD. |
| 26.04.24 - [6] | AD advised that Lettable Standards should also be looked at | Lewis Walmsley | N/A | This will be an ongoing action and to review if this would sit best as a Task & Finish, or within a Deep Dive setting. |
| 26.04.24 - [7] | Review how many complaints have went to Housing Ombudsman from Quarter 3 to Quarter 4 | Michael McGuigan | 22.04.24 | Michael to action and liaise through Customer Committee. |