

Port of Leith Housing Association

Customer Care policy

Introduction

Providing excellent services to our tenants and other customers is a key business goal for the Association. We pride ourselves on putting our customers first and ensuring our services are flexible and meet their needs. The Association has set specific Customer Care standards for staff to deliver and provides detailed guidance to staff on how to meet the standard expected.

Associated Policies

The Customer Care policy links with our Equal Opportunities Policy, Health and Safety Policy and Complaints policy.

Our Customer Care standards

We will :

1. Listen attentively.
2. See things from the customer's perspective.
3. Apologise if we have made a mistake.
4. Treat people equally and politely.
5. Manage any particular need for translation, disability.
6. Give **all** the information the customer requires and ensure it is accurate and clear.
7. Respect confidentiality.
8. Ensure we can deliver what we say we will do.
9. Ensure we do what we have promised.
10. Dress appropriately for the occasion.
11. Ensure the reception area is always:
 - ❖ clean, tidy and welcoming
 - ❖ the signage is clear – who we are, when we are open, where to go, facilities available *e.g. induction loops/ wheelchair accessibility/ interpretation service.*
 - ❖ Display clear information about our services and those of other important service providers.

Our standards for first contact with the customer are:

1. Treat each customer well, be polite, sound friendly and interested.
2. Tell them who you are.
3. Ask how you can help them.
4. Make a real effort to be helpful.

5. Smile and look at the customer as you speak to them.
6. Use their name in your conversation.
7. If you have to pass them on to someone else, ensure they are aware of who they are being referred to and why.
8. Do everything you can to help the person and only pass them on if necessary. Most people hate being passed on. Consider if you could get the necessary answer for them and let them know or call them back.
9. The exception to this is phone calls to reception. Here staff need to pass the call over to the appropriate person quickly to free up the switchboard again.

Our standards for phone calls are:

1. We will answer the phone as a top priority.
2. We will tell the customer who they are speaking to.
3. If we can't deal with the enquiry immediately we will tell the customer what we can do and when, or say why we can't help and tell them who can.
4. If a voice mail message has been left we will prioritise returning the call by at latest the next day.

Our Standard for responding to letters are:

1. To respond to all letters within 3 working days of receiving them.
2. To make sure our letters are clear and easy to understand.
3. To follow our standard layout to maintain a corporate style.

The Standards we expect from our Contractors are

1. Contractors tradespersons will always carry ID cards and show these to tenants when requesting access:
 - ❖ These should have their photograph,
 - ❖ Name of contractor & logo
 - ❖ Contractor's address & phone number.
2. The contractor has no right of access without the tenant's permission.
 - ❖ Advance notice of access will be given through making appointments am/pm in a particular day.
 - ❖ Appointments made which cannot be kept to must be advised of in advance of the appointment time.
3. The Contractor will ensure their operatives respect the fact that they are generally working in people's homes
 - ❖ Dustsheets will be used to cover belongings from dirt/ dust.
 - ❖ Any furniture /carpets etc in the way will be carefully moved by the contractor prior to starting the work and returned on completion.

- ❖ Health and safety will be considered at all times and there must be no danger posed to tenants or visitors to the property.
- ❖ At the end of the working day the tenant and other occupants of the close must be left with water, sanitation, power, heating and be able to keep the property secure.

Ensuring our services are accessible

1. The office is open to the public from 8.45am to 5pm Mon to Thurs and 8.45 to 3.45 Friday. We no longer close for lunch.
 - ❖ Messages for any staff member or repair requests can be left out of hours on an answer phone.
 - ❖ We use the manned Bield 24 Response service as the contact for emergencies out of hours.
 - ❖ We will make home visits if these are needed.
 - ❖ The office is fully wheelchair accessible.
 - ❖ We provide a full interpreting service for phone calls, discussions or letters.

2. We give general advice and take repairs on demand. So that the correct person is available we make appointments for all detailed queries. For urgent matters appointments will be made quickly:
 - ❖ For Edindex waiting list general enquiries it will be 3 working days before an appointment can be given.
 - ❖ For routine repair inspections it will be one week before an appointment is given.

3. All our staff carry ID.

Promoting our Customer Care Standards to Tenants.

A leaflet is displayed in the office and given to all new tenants on sign up.

Obtaining Feedback on our Services

Feedback forms are available in the office and on the web site for any one to complete and return.

We also undertake regular sample surveys to check on how well our services are meeting customer needs.

The outcomes of these are reviewed by the Tenants' Focus group and the Management Team and any appropriate service changes made.

Ensuring the organisation complies with our Customer Care Standards.

All new staff are made aware of the Association's key business goal of delivering excellent customer service. All staff are retrained 3 yearly on good customer care. Detailed guidance for staff on, what is meant by, and how to deliver, excellent customer care in Port of Leith Housing Association was

developed with the staff team in 2007 and all staff are required to follow this guidance.

Review Period This Policy will be reviewed in 2010.

PORT OF LEITH HOUSING ASSOCIATION

CUSTOMER CARE PROCEDURES

1. PUTTING THE CUSTOMER FIRST

Customer Service is the cornerstone of what we ALL do.

- ❖ Not only do we serve customers who receive or enquire about our services, but we also serve each other - supporting each other in the work that we do.
- ❖ Giving good service is therefore a priority for everyone.

Even when we are telling a customer something difficult and that they don't want to hear, we can do it in a way that makes them feel valued.

The way we treat our customer matters because the Association is judged on their experience of us.

- ❖ Put yourself in the customers' shoes – how would you feel in the same situation?
- ❖ If the answer is uncomfortable, angry or frustrated, question whether you have given good customer service to them.

Good service is a team effort.

- ❖ If we all aspire to give the same excellent service to the customer and to colleagues, everyone will benefit.

Our standards are :

We will :

12. Listen attentively
13. See things from the customers perspective
14. Apologise if we have made a mistake.
15. Treat people equally and politely.
16. Manage any particular need for translation, disability.
17. Give **all** the information the customer requires and ensure it is accurate and clear
18. Respect confidentiality
19. Ensure we can deliver what we say we will do
20. Ensure we do what we have promised.
21. Dress appropriately for the occasion. This means business smart.

[This does not have to be a suit, but you should look dressed for work and not for a social occasion. Remember, the Association does not regard denim jeans as business smart].

- P** promises must be delivered
- O** open minds – respect individuality
- L** listen attentively
- H** help as much as you can
- A** accuracy is important

2. FIRST IMPRESSIONS

People tend to make a judgement about a situation, or a person, in the first 90 seconds of meeting them.

Making the initial experience of the customer a positive one is therefore crucial - how the reception area looks and how the person is greeted is very important.

Our standards for our reception area are:

1. Our signage is clear
 - who we are, when we are open, where to go, facilities available
e.g. induction loops/ wheelchair accessibility/ interpretation service.
2. Information about our services and important other service providers are clearly presented and are up to date.
3. The area is always tidy, clean and welcoming.

Our standards for first contact with the customer are:

10. Treat each customer well, be polite, sound friendly and interested.
11. Tell them who you are.
12. Ask how you can help them.
13. Make a real effort to be helpful
14. Smile and look at the customer as you speak to them.
15. Use their name in your conversation.
16. If you have to pass them on to someone else, ensure they are aware of who they are being referred to and why.
17. Do everything you can to help the person and only pass them on if necessary. Most people hate being passed on. Consider if you could get the necessary answer for them and let them know or call them back.
18. The exception to this is phone calls to reception. Here staff need to pass the call over to the appropriate person quickly to free up the switchboard again.

3. HELPING THE CUSTOMER ON THE PHONE

Our standards for phone calls are:

5. We will answer the phone as a top priority.
6. We will tell the customer who they are speaking to.
7. If we can't deal with the enquiry immediately we will tell the customer what we can do and when, or say why we can't help and tell them who can.
8. If a voice mail message has been left we will prioritise returning the call by at latest the next day.

How to meet our standards when answering the phone:

At reception :

- ❖ greet the customer and give your name
"Good morning/ afternoon, Port of Leith Housing Association, Joe Bloggs speaking, how may I help you"
- ❖ Ask for their name and address and the nature of their enquiry.
- ❖ Advise who you are putting them through to, the persons name and section.
- ❖ For Property repairs use a repair request form to advise of the request.
- ❖ For other enquiries, if you can't connect them to the appropriate person, ask if they would prefer to leave a voicemail, or for you to leave a message for the person to call back. If they wish a message left, send an email to the person. Ensure the customer knows the staff member will call back by the next day.
- ❖ If you are dealing with a customer at the reception desk and a phone call comes through, leave the phone call to be answered by the back up person.

Everyone:

- ❖ Answer any phone ringing in your team – take a message if necessary and send the appropriate member of staff an email.
- ❖ Greet the customer and give your name
- ❖ Make sure you listen carefully and take notes
- ❖ Don't make promises you or your colleagues can't keep
- ❖ Ensure you have explained clearly what you will do and when
- ❖ Make sure the promise is kept and the action done.
- ❖ Remember if the call is not for you it is still your responsibility to help
 - If you can deal with the enquiry do so
 - If you know who can assist put them through to the right person,
 - If you don't know who can help or are not sure, advise that you will get the appropriate person to call back. Find out who this should be and ask them to call back as soon as possible.

9. MANAGING TECHNOLOGY

When you are out of the office on visits, or at a meeting use the technology available to give a good customer service and to keep safe:

Manage your Voice mail well

- Make sure your message is clear with your name and a number where the caller can speak to someone not just a machine if they don't want to leave a voice mail message.
- If you will not be back at your desk for more than a day change your message to advise of this and give the date you will be back and the name of someone else they can speak to in your absence.
- Divert your calls to voicemail if your phone will not be picked up by a colleague in your absence.
- On your return, check your voice mail messages and respond to them quickly.
- Remember our standard is to get back to customers, both internal and external, no more than a day later.

Manage your email well

- Check for new messages at least twice a day. Remember our standard is to get back to customers, both internal and external, no more than a day later.

Ensure you keep your Outlook calendar up to date and accessible to everyone: so that colleagues know where you are and when you expect to be back.

Take a mobile phone with you and keep in contact with your colleagues if you are running late. There is a general mobile available in the Housing Team.

5. HELPING CUSTOMERS WITH LETTERS

Our Standard is:

4. To respond to all letters within 3 working days of receiving them.
5. To make sure our letters are clear and easy to understand.
6. To follow our standard layout to maintain a corporate style.

What you should do to meet this target:

Most of our letters now come as standard letters from SDM.

The standards below apply when a non standard letter is being drafted:

- Use the **corporate letter layout and font** so that the letter is in the Port of Leith Housing Association accepted style
[see folder on shared drive: templates/ letter].
- Save with your reference and type over the template].
- Ensure you save the letter in your Departmental shared drive and with the appropriate folder references for your team so it can be easily found.
- Make sure everything you write is accurate, easy to read, uses every day words and has no jargon.
- Short sentences are generally easier to understand.
- If you have to use technical words, explain them.
- Use the customers name, eg Mrs Smith rather than Sir/ Madam
- Use spell check to ensure accuracy.
- Sign the letter using “Yours sincerely,” unless you don’t know the name and are having to use “Sir/ Madam”, in which case use “Yours Faithfully”. And give your job title.

[Standard letter attached as appendix 1]

6. MANAGING DIFFICULT SITUATIONS

Sometimes customers are already upset by the time they speak to you. If this happens:

- Don't take it personally.
- Be polite, stay calm by taking a deep breath, make eye contact and check that your body language isn't aggressive. Speak quietly and slowly.
- Use the customer's name.
- Listen to what the customer has to say and let them 'get things off their chest'.
- Apologise if appropriate.
- Ask relevant questions that show you are trying to understand rather than argue with the customer.
- Be assertive but not aggressive or rude and don't argue.
- Think about what the customer has said before responding and offer positive advice. Say you want to help.
- Make your suggestion to sort the problem and check this is okay with the customer.
- Summarise.
- If the customer won't accept what you are saying, say something to show that you understand and what you can do and keep saying 'no' and repeat these actions.
- If you can't resolve the matter to the tenant's satisfaction, advise again of what action you will take and close the discussion.
- If it is a serious matter and you think that it will help, or the customer makes the request, get someone else to discuss the matter with the customer to reiterate what you have said.

Make sure that you are aware of the Association's **Personal Safety Guidelines [on PORTOL]** and know what your section's arrangements are for calling for help if a customer becomes violent – remember your safety is very important.

- Make sure you know where the panic buttons are.
- If you become concerned during an interview, excuse yourself and speak with your Manager or colleague as appropriate. Make sure you get the necessary support.
- Use your judgement and, if appropriate, invite the customer into an office to discuss the matter in private. Simply getting the customer away from the public area can help to calm the situation and allow you to take control. But be aware of problems of sex or ethnic or cultural customs (for example, it wouldn't be appropriate for a man to suggest to a Muslim woman that they move to a private office).
- Above all, don't put yourself at risk.

Advise your Manager of all incidents if someone is abusive or violent. The Incident Report Form contained in the Personal Safety Guidelines must be completed and returned to the Personnel Manager if this should occur.

7.0 VISITING CUSTOMERS IN THEIR HOMES

- Arrange a convenient time to visit. If necessary, book the Interpreting and Translating Service in advance.
- Whether rented or bought, a customer's home is their territory, so treat it with respect, no matter what you think of its condition.
- Where a tenant is known to be aggressive they should always be invited into the office rather than being visited at home.
- If there is any doubt about an applicant, or tenant, being visited, you should visit in pairs – one can visit and the other stay in the car if this is more appropriate

Enter in the office in/out sheet details of where you are going and when you will be back. If you are going to be late, you must telephone a member of your Team. If you are making a visit after working hours or are not returning to the office, always contact another member of staff to confirm that there are no problems.

It is the responsibility of Team Members to make contact with their colleague if they have not returned by the agreed time.

- Take a mobile phone and ensure it is switched on.
- Always be alert to dangers e.g. potential weapons within a house.
- Try to sit near the door and make sure there is a clear line of exit.
- Allow enough time for your visit - don't leave the customer feeling rushed.
- When you arrive, make sure you introduce yourself and show the customer your ID card.
- Be sensitive if you are discussing awkward situations such as rent arrears and neighbour disputes.
- If a customer becomes aggressive use your initiative and get out if required. If threatened leave immediately.
- If the customer is having difficulty understanding what you say, don't shout. Try to find out what the problem is and deal with it (it could be a language problem, not a hearing problem).
- No access card should be left when this occurs.

8.0 CUSTOMER SERVICE STANDARDS WE EXPECT FROM OUR CONTRACTORS

The standard for identification

Contractors tradespersons will always carry ID cards and show these to tenants when requesting access:

1. These should have their photograph,
2. Name of contractor & logo
3. Contractor's address & phone number.

The standard for access

The contractor has no right of access without the tenant's permission.

1. Advance notice of access will be given through making appointments am/pm in a particular day.
2. Appointments made which cannot be kept to must be advised of in advance of the appointment time.

The standards for working in a home

The Contractor will ensure their operatives respect the fact that they are generally working in people's homes

1. Dustsheets will be used to cover belongings from dirt/ dust.
2. Any furniture /carpets etc in the way will be carefully moved by the contractor prior to starting the work and returned on completion.
3. Health and safety will be considered at all times and there must be no danger posed to tenants or visitors to the property.
4. At the end of the working day the tenant and other occupants of the close must be left with water, sanitation, power, heating and be able to keep the property secure.

9.0 DEALING WITH COMPLAINTS

Despite our best efforts in delivering good customer services, there may be occasions when the customer is not happy about something. When this is the case it is important we are told about it so that we get a chance to sort it out. This enables us to keep an eye on the quality of service we are providing and to try to continually improve it.

Our Service Standards in managing complaints are:

1. To resolve complaints as quickly as possible, treating them with priority and keeping the customer informed on when it will be resolved if it can't be dealt with then and there
2. To record complaints, so that we can see if we are continuing to provide good services and ensure the complaint, plus any underlying ineffectual processes are fixed.
3. To minimise the number of Formal complaints we receive by giving a good service in the first place and managing any problems raised informally.
4. To have no complaints found against us by the Ombudsman
5. To ensure customers know how to make a formal complaint and how we will respond.

INFORMAL COMPLAINTS

1. All complaints about the service are to be accepted and dealt with.
Remember - it doesn't matter how the person wishes to make the complaint i.e. over the phone, in person or in writing.
 - The only exception to this is anonymous complaints, which obviously can't be responded back to.
2. Where the complaint is the first one being made about a service received, it should be passed to the most relevant person to deal with.
3. When you are asked to deal with a complaint you must:
 - Prioritise resolving it, if possible doing so there and then
 - If it can't be resolved immediately, then keep the person advised of progress and the timescale for its resolution within 3 days.
 - If this has to change, ensure the customer is advised of why within the 3 days and the new timescale.
 - Advise the Manager when a complaint highlights processes are not working and give suggestions for resolving this.

Monitoring informal complaints

Within the Housing Team all written complaints received are recorded with who they went to and date dealt with.

Within the Property team record all service failures of contractors which are received are recorded and outcomes monitored.

- The volume of these informal complaints are also monitored in the Association's Key Performance Indicators process.

FORMAL COMPLAINTS

Where the customer feels we have not resolved the issue to their satisfaction and wishes the complaint to be considered again this must be treated as a formal complaint.

The Association has a separate complaints policy and Procedure document attached

Port of Leith Housing Association

Complaints Policy

Objective:

Port of Leith Housing Association aims to provide high standards of customer service. All staff are required to follow our Customer Care Policy and Procedures, which should provide a service requiring few or no complaints.

The aim of this policy is to give customers a clear process to follow when things go wrong, so that problems are recorded and dealt with as quickly as possible and any changes required to processes are picked up and dealt with.

Monitoring both informal and formal complaints gives us the chance to keep an eye on the quality of service we provide so that we can continually work to improve it.

Associated Policies and Procedures

This policy is linked to the Customer Care Policy and Procedures.

Eligibility to make a complaint

Anyone who receives or requests a service from Port of Leith Housing Association can use the complaints policy.

This includes tenants, people applying for housing, owners or sharing owners and people living in neighbouring property, other organisations and contractors and suppliers. It also applies to people who may be acting on a tenant's behalf, such as a councillor, Member of Parliament, advice agency, solicitor, friend or relative, tenants' group or residents' Association.

The complaint can be about any aspect of our service which they are unhappy about. The complaint does not need to be put in writing and can be taken over the phone.

Our Service Standards in managing complaints are:

- All complaints about the service will be considered and dealt with.
- 6. To resolve complaints as quickly as possible, they will be treated with priority and the complainant kept informed on when they will be resolved, if the problem can't be dealt with immediately.
 - Where the complaint can't be resolved immediately, the person is to be advised of the timescale for its resolution within 3 days.
 - If this timescale has to change, the customer is to be advised of why within the 3 days and of the new timescale.

- Once the problem is resolved the complainant is to be advised of the outcome over the phone if the complaint is informal and in writing if it is formal by the timescale advised.
 - No complaint should take more than 2 weeks to resolve.
7. All complaints made in writing, all contractor complaints where there has been a service failure, complaints that our staff have not kept to an appointment and all formal complaints will be recorded. This will let us monitor if we are continuing to provide good services and ensure the complaint, plus any underlying ineffectual processes are resolved.
 8. The relevant Manager will ensure appropriate action is taken in each recorded complaint case. The number of complaints and whether formal complaints have been dealt with in the policy timescales will also be reviewed regularly by the Management team.
 9. Our target is to have no complaints found against us by the Ombudsman
 10. To ensure customers know how to make a formal complaint and how we will respond, we will publish this policy by way of a leaflet in our office and on the web site.

Appeals

When a complaint is made formally, the response to it will always be put in writing and the complainant advised of the appeals process if they are not happy with the outcome. A request for an appeal must be made in writing, stating what the complainant is unhappy with in the response to their formal complaint and what action they expect from us.

When a complaints appeal is received, it will be acknowledged in writing within 3 days and a timescale given for investigation, and response. It is not expected that any appeal will take more than 2 weeks to investigate and respond to.

An appeal hearing will be set with the Corporate Services Director and a further Director, who has no remit in the area of complaint. The outcome of the Appeal Hearing will be advised of in writing to the Customer within 3 days of the hearing taking place.

If an Appeal is about a Director or the Managing Director's behaviour, these will be considered by 3 members of the Audit Committee of the Association. In these cases the timescale for response to an appeal will be extended to one month.

Complaints Policy

Procedures

Informal complaints

1. Where the complaint is the first one being made about a service received, it should be passed to the most relevant person to deal with.
2. Recording complaints
 - Within the Housing Team all written complaints received are recorded with who they went to and date dealt with. Also any complaints, no matter what the source, about failure to attend appointments made by staff.
 - Within the Property team all service failures of contractors and failed staff appointments, no matter what the source and any complaints received in writing will be recorded.
 - The Manager of each team is responsible for ensuring all complaints are reviewed on a monthly basis and that appropriate action has been taken.
 - No other informal complaints are logged and monitored
3. When asked to deal with a complaint you must:
 - prioritise resolving it, if possible doing so there and then.
 - if it can't be resolved immediately, then keep the person advised of progress and the timescale for its resolution within 3 days of receiving the complaint.
 - If this timescale has to change, ensure the customer is advised of why and the new timescale.
 - Advise the Manager when a complaint highlights processes that are not working effectively and give suggestions for resolving the problem.

FORMAL COMPLAINTS

Where the customer feels we have not resolved the initial concern to their satisfaction and wishes the complaint to be considered again or asks for the complaint to be treated as a formal complaint initially, this must be treated as a formal complaint.

Initial Procedure:

1. Ask the customer to put the complaint in writing, so that their concerns can be absolutely clear to us, and how they would wish us to resolve the issue clarified.
 - Leaflets on the formal complaints process are available and can be given to or sent out to complainants with a prepaid response section to complete.

2. If the complainant does not want to make the complaint in writing themselves but wants the complaint to be treated formally, then help them to do so by recording their concerns for them. Read out to them what you have taken as the reasons for the complaint and how they would like it resolved. Sign the record and detail that the customer was advised of the wording.
 - This record will then be treated as a formal written complaint.
3. All formal complaints received must be logged in the shared drive [S] in :
 - excel spreadsheet file : complaints record/ folder: year/ appropriate sheet for team/type of complaint.

Managing Formal Complaints

1. Formal complaints will be managed by the relevant Manager, unless they are about them, in which case their Director will deal with the matter. In the case of complaints about a Director the Managing Director 3 members of the Audit Committee of the Association will review and respond to the complaint. In these cases the timescale for response to an appeal will be extended to one month. Management Committee members will deal with the matter with support from the Corporate Services Director on process and paperwork as required.

2. The timescales to manage the response to formal complaints are :
 - 3 days to acknowledge
 - a maximum of 2 weeks to resolve.
3. A written response must be made to the complainant after investigation advising on the response. This letter must explain that appeals can be made and a copy of the “Complaints leaflet” enclosed, which advises of how to appeal, timescales and the right of a further appeal to the ombudsman.
3. Record keeping:

The original complaint letter should be scanned and filed in shared drive [s], complaints file/ folder: complaints record/year/ sub folder team [housing, property, other]
 - reference: surname /date received / letter of complaint.

Acknowledgement letter should be copied to the shared drive [S]
 • In file : complaints file / folder: complaints record / sub folder: year/ sub folder: team [housing, property, staff, other]
 • - reference / surname / date sent/ acknowledgement.
 • And the excel spreadsheet updated

The Response letter should also be copied to the shared drive[S]
 • file : complaints file/ sub folder :complaints record : year: team [housing, property, staff, other] / reference /date/ surname / date sent / response.
 • And the excel spreadsheet updated

Appeals

The Corporate Services Director is responsible for managing all Complaints appeals.

Following investigation, an appeal hearing will be set with the Corporate Services Director and a further Director, who has no remit in the area of complaint.

Exceptions to this are any Complaints about a Director or the Managing Director. These will be appealed to 3 members of the Audit Committee of the Association. In these cases the timescale for response to an appeal will be extended to one month.

The Corporate Service Director will maintain the Appeal records as above.

Complaints made to the Ombudsman

Any case being dealt with by the ombudsman will be managed by the most appropriate Director.

- Records will be kept on the shared drive Complaints File as above.
- Timescales of 3 days to acknowledge and 2 weeks to deal with any requests for information if this is not all immediately to hand will be adhered to.

Ann MacDonald
Corporate Services Director
September 2nd 2007.