



torus

Customer Experience Strategy 2024 - 2027

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Document control

Period covered 2024-2027

Group strategy – approved by Landlord Operations Committee

Responsible officer – Group Housing Director

Review in 3 years (2027)

1. Executive Summary

Tenants, leaseholders and other Torus customers should always be able to access services quickly and in a way that reflects their needs. The customer experience should be in every Torus colleague's DNA – for the whole lifecycle of an enquiry – and internal systems and processes should support the right team, or multiple teams, to take ownership and provide excellent customer service, from first contact to resolution.

This three-year strategy explains how we will take a broad-based approach to customer experience from 2024 onwards. It starts with the commitment that Torus will work to meet tenants' many different access needs and preferences, and incorporates both culture and training for Torus colleagues, as well as the development of platforms and processes to meet changing customer priorities.

Our approach is to:

- provide a choice of access options to ensure tenants, leaseholders and other customers can always contact us easily and in a straightforward way
- work to get issues resolved at the first point of contact, so that customers receive a resolution without being transferred to numerous internal teams
- understand and respond to individual needs and preferences, including potential barriers and access issues, so that all tenants, leaseholders and other customers can be confident that services provided are equitable and inclusive
- invest in digital platforms, including the online customer portal and internal housing management systems, whilst increasing local presence in communities
- enhance data and insight so that services can effectively respond to different tenants' needs and that overall access requirements and preferences are understood
- embrace cultural change across the whole organisation and invest in training and systems improvement so that all colleagues are empowered to put the customer first

A number of Torus strategies and policies support this Customer Experience Strategy. These must always be read in conjunction with this document and comprise:

- Inclusion Strategy
- Vulnerability and Reasonable Adjustments Policy

Supporting strategies include:

- Business and Customer Intelligence Strategy
- Communications and Engagement Strategy
- ICT Strategy

2. Introduction

Torus recognises that all customers – tenants, leaseholders and others – should be able to access services equally, regardless of their preferences or any barriers to access they may face.

The Group offers a range of ways in which customers can access services, ranging from in-person contact via Neighbourhood Officers and receptions to phone, email and online self-service. The focus is on being a highly communicative and responsive organisation that puts customers' voices at the heart of service delivery. Listening to service users – and to the information gathered by our performance and insight teams – is essential for Torus to respond to current and future need.

As customer expectations and national legislation change, and as technology evolves, a focus on continual improvement in customer experience is therefore essential.

This strategy provides a three-year vision to build on customer access outcomes delivered to date, based upon four priority areas for change that have been identified:

- Understanding tenants and their diverse needs
- Communication and collaboration
- Systems and processes
- Culture, behaviour and common practices

Sections 4 to 6 of this strategy outline the context in more detail, the nature of current challenges and opportunities, and the priority actions to deliver against 2024-2027 customer experience ambitions.

3. Strategic Links

Internal Drivers

The Torus Group Corporate Plan 2021-2026 sets out four goals that directly relate to safeguarding outputs. These are:

- **Investment** Deliver excellent services driven by quality, value for money and changing demand
Embrace innovation and technology to drive efficiency and enhance services
- **Intelligence** Provide tailored solutions based on an understanding of need and aspiration
Embed a culture of evidence-based improvement and learning from experience

At the time of writing this strategy, a new Group Corporate Plan is being developed and will launch in April 2024. This will comprise three key themes: People and Services; Homes and Communities; and Viability and Sustainability. This section of the Customer Experience Strategy will therefore be updated at the time when linkages to the 2024 to 2029 Corporate Plan have been established.

External drivers

This strategy responds to the Social Housing White Paper (November 2020) and subsequent policy and legislation arising from this.

Key external drivers include:

1. Elevated financial and regulatory pressures, including the unrelenting cost of living crisis and an increased level of national scrutiny and regulation of social housing providers.
2. The Regulator of Social Housing's new Consumer Standards and Code of Practice. These require landlords to be open with tenants and treat them with fairness and respect so that they can easily access services, raise complaints and influence decision-making.
3. Tenant Satisfaction Measures (TSMs): in place since April 2023, these measures have redefined tenant-landlord relationships, emphasizing transparency, industry benchmarking, and collaboration on performance-related issues.
4. The National Housing Federation and Chartered Institute of Housing's Better Social Housing Review (2022) and subsequent Action Plan (2023)

4. Where are we now?

Torus launched a three-year Customer Access Strategy in late 2021. Entitled 'Here when needed', this focused on (1) developing agile contact and transactional channels, tailored to different tenant preferences, and (2) responding to ever-changing tenant need. The approach was broken down into four priorities:

- Consistent: always delivering to the same high standard
- Accessible: providing a range of options so tenants can choose the channels that suit them best
- Responsive: Adapting to meet changing needs and the changing environment
- Engaging: improving service delivery in partnership with tenants, leaseholders and other customer groups

In 2021, the focus was on digital by design, optimising customer migration to digital channels where possible and focusing resources on supporting tenants and other customers who are unable to self-serve.

Torus offers a number of different ways for tenants to access services, including online (using a dedicated customer portal), by phone or email, and in-person, either by attending a Torus reception or via a home or neighbourhood visit. Opening hours at the Torus Customer Hub were extended in 2023, moving to 8am–8pm Mondays to Fridays, and 8am–12noon on Saturdays, with the emergency repair phone line available on a 24/7 basis.

Additional provision is in place for tenants who may face barriers when contacting Torus, including: BT Relay UK, a free service for people who are hard-of-hearing or speech impaired; Language Line and the Big Word, for translation and interpretation, and Reach Deck, an online accessibility tool available on the Torus website.

As of December 2023, the breakdown by access type per month stood at:

- 40,000 phone calls
- 12,375 emails
- 1,800 – 2,300 visits to a Torus office reception
- Over 740 home or neighbourhood visits
- 18,800 registrations on the online tenant portal

4.1. A changing environment

The external environment has changed since the launch of 'Here when needed' in 2021 and, as a sector, the focus has moved from digital by default to the provision of fully responsive customer access solutions for each tenant and tenant demographic (see 'Strategic Links, above); from concentrating resources on those most in need of support to responding appropriately across a spectrum of different needs and from a diverse customer base.

Torus has made substantial progress towards this objective, including:

- Launching the Group's first Vulnerability and Reasonable Adjustments Policy in September 2023: this sets out the range of additional support available for vulnerable people and those facing exceptional circumstances, aligned to its parent, this Customer Experience Strategy. The Torus Inclusion Strategy will be renewed in mid-2024 and an Inclusion Policy is also being developed.
- Establishing a central Complaints team to improve way Torus handles tenant complaints, and ensure issues are addressed effectively and with respect and accountability
- Extending opening hours at the Customer Hub to increase accessibility throughout evenings during the week and weekends.
- Focusing the Torus Housing Vision on accessibility principles. The vision To provide consistently outstanding landlord services that put tenants, leaseholders and their families first is supported by five key commitments:
 1. Treat tenants and leaseholders with respect, empathy and understanding, every time they access our services
 2. Tailor how we deliver services to meet individual customer needs and preferences
 3. Keep our promises - and keep tenants and leaseholders informed of how we are delivering them
 4. Get it right first time and, if we don't, act quickly and effectively to make things right
 5. Be visible to our customers and actively present in our neighbourhoods, harnessing the power of partnerships with local service providers and community groups
- Strengthening insight about existing tenants, through an internal Data Maturity initiative supported by a tenant survey to all Torus homes in October to December 2023. Headline data from 'Tenant Census' project respondents indicates that:
 - 95.1% of tenants can read/write English very well or well
 - Levels of vulnerability are significant: 9.5% of tenants have difficulties with learning, understanding or concentrating; 19.7% have mobility issues; 21% are living with mental health conditions; and 3.2% have vision impairments
 - 91.3% of tenants have internet in their homes
 - 9.3% of tenants with a health condition or disability said they needed support to access Torus services
 - 13.8% of tenants currently prefer to contact Torus online (compared to 64% by phone and 39.8% by email), but 64.7% would use online platforms if they were easier to use

4.2. Challenges

Work began on the 2024-2027 Customer Experience Strategy in mid-2023, driven by the central objectives to:

- design effective access pathways that work for all - utilising existing contact points and enhancing digital journeys
- look 'through the lens of the customer' at the whole lifecycle of tenants' interactions with Torus, rather than solely at the provision of different access platforms; and
- ensure the customer access approaches designed in the lifetime of the new strategy reflect and respond to the needs of a diverse customer base.

A series of tenant and colleague workshops took place in 2023 and 2024 to review common barriers to effective customer access and to identify potential future improvements. The challenges set out below were identified during these sessions.

4.2.1. Understanding tenants and their diverse needs

Torus teams should be able to access and input accurate data at tenancy and household level; this will ensure they understand and can respond to tenants' unique access needs from the first point of contact. Data availability and maturity is an issue, and whilst initiatives like the Tenant Census are supporting the drive for improved insight, there is more work to be done. Teams do not have consistent access to information around vulnerability, potential barriers and tenant contact preferences.

Until complete information exists at tenant level, Torus will not be able fully to understand the extent to which access approaches may need to change. For example, the number of people who do not have the skills, confidence or money to access digital services is not yet fully understood. Similarly, whilst Torus knows that some tenants face barriers to accessing Torus services, a full picture of different access challenges is not yet available. This strategy therefore includes the ambition for Torus to enhance and extend data collection mechanisms as part of business as usual, and to enhance the systems on which data is stored.

4.2.2. Communication and collaboration

Torus uses multiple channels to communicate with tenants and, often, multiple teams need to play their role in order to resolve a complex query. However, both communication and collaboration can present challenges:

- standard terminology does not exist, communications are not always simple, precise and clear, and responses to potential tenant barriers such as literacy and difficulties with English language are not consistently in place and/or adopted
- the roles of different teams are not wholly understood within Torus, leading to tenant enquiries sometimes being allocated to the wrong team and multiple interventions being needed to rectify this
- clarity is needed through the effective deployment of clear strategies, policies and procedures across the group

4.2.3. Systems and processes

Whilst tenant self-service exists online, the platform should be enhanced and other solutions (for example, an app and live chat) should be introduced.

Meanwhile, internal systems used by Torus teams do not always talk to one another and information is sometimes kept in inconsistent places. Some frontline teams have access to all information systems; others (including colleagues working for Torus Foundation) do not. As a result, not every Torus colleague can see where the tenant is in their customer journey.

4.2.4. Culture, behaviour and common practices

Excellent customer service should be at the heart of every Torus colleague's approach. Whilst it was agreed that colleagues always have the right intentions, there are issues around ownership of a tenant's enquiry from first point of contact to resolution. Additional training in systems, processes and customer diversity was identified as the best way to address this and ensure consistency across all team members.

Additional support is available for tenants facing barriers to accessing services. For example, Language Line and The Big Word are available for interpretation and translation interventions. However, there is a lack of consistency across different teams at Torus so that, currently, some tenants benefit from additional support whereas others may not.

More can be done to establish a culture of empathy and responsiveness to difference. For example, receptions could have private facilities for tenants who would like to discuss matters privately and these could be available to all on request.

These challenges are addressed in Section 5, below.

5. Where do we want to be?

This strategy aims both to build on the foundations laid by previous customer access strategies and to respond to growing expectations on housing providers around delivering consistently timely, professional and empathetic services for all customers. As such, it aims to take Torus in a new direction, understanding that access is about the whole customer experience and not just about the quality of the platform or process being used to make contact.

Our customer access vision aligns to the Housing Vision (section 4.1, above) and is as follows:

We want every customer to benefit from positive, supportive interactions, each time they contact us, built on respect, empathy and understanding.

We will offer a spectrum of ways for customers to get in touch. We will keep improving these in line with what customers are saying and we will work with external stakeholders at neighbourhood level to build relationships and enhance the customer experience.

Excellent customer access depends on colleagues feeling engaged, empowered and inspired to make a difference, not solely on platforms and systems. Our teams will be responsive to individual customer needs, take ownership of the enquiry and keep tracking progress until any issues are resolved.

5.1. Strategy priorities

Four central themes will underpin delivery of this strategy. Each has been designed to support the strategy outcomes shown in Section 5.2.

5.1.1. Understanding tenants and their diverse needs

- Step up efforts to gather, manage and use accurate information for all Torus tenants and households
- Ensure data is well managed throughout the collection cycle, and available to frontline teams. Use this data and intelligence to plan strategically
- Map tenant and customer journeys in consultation with tenants to understand where issues and frustrations arise, and where some tenants may face barriers to equal access
- Develop Torus approaches to tackle these common tenant barriers, and communicate clear advice to all colleagues who work with tenants
- Fully implement and embed the Vulnerability and Reasonable Adjustments Policy across the organisation, and launch a full policy in September 2024

5.1.2. Communication and collaboration

Develop simple and clear principles for Torus teams to use when communicating with tenants.

This will include:

- A 'Torus Way' of communication, based on simple and standard terminology, and avoiding the use of 'jargon'
- Clear guidance for colleagues about ways to support tenants with language and other barriers to access additional support. This will incorporate advice around use of accessibility tools (such as Language Line and the Big Word) as well as broader support for vulnerable and at risk groups (as outlined in the Torus Vulnerability and Reasonable Adjustments Policy)
- The creation of tenant 'journeys' based on frequent contact types, outlining the roles and responsibilities of Torus teams from first contact to resolution

5.1.3. Systems and processes

- Develop an enhanced customer portal and launch an App, recognising that most customers who access the portal use a mobile phone
- Transition from digital by default to digital by choice, making it easier for those who want to interact with Torus online to self-serve effectively using integrated processes whilst respecting the choices other tenants make to opt for in-person visits or phone calls
- Audit and enhance functionality within Torus' housing management system (QL) and roll out access and training for all frontline colleagues, so that the same information is available to everyone who may interact with tenants
- Incorporate requirements for fit-for-purpose systems into the Torus ICT Strategy, and ensure customer access priorities flow through ICT platform and system enhancements

5.1.4. Culture, behaviour and common practices

- Establish and embed a 'Torus Way' of customer service and common practice, linked to consistent communication (above)
- Actively drive culture change so that all colleagues meet tenant requirements and expectations, as well as future practices and legislation. This will support colleagues adopt behaviours and mindsets consistent with Torus' objectives and values
- Identify and tackle skills gaps wherever they exist, linked to the Torus Competency Framework
- Roll out additional training for key customer access areas, including Customer Services and Equality and Inclusion
- Increase Neighbourhood Officer presence in neighbourhoods and work to do likewise with other key frontline roles within available resources

5.2. Strategy outcomes

This strategy will have delivered on its primary aims when the following 10 outcomes have been achieved:

1. Torus fulfils its duties and proactively works to improve the quality of services for all tenants, leaseholders and other customers
2. Queries are resolved at first point of contact, wherever that is possible
3. The Torus service offer is personalised to reflect customer preferences, such as a preferred means of communication
4. Tenants indicate that they are able to engage with Torus services at a time and in a way that is convenient to them
5. Digital by choice is embedded across all customer-facing teams, including the launch of an improved self-service portal and Torus App
6. Involved tenants and the wider tenant base contribute to all relevant service reviews, service improvements and customer access as a whole
7. A single accurate customer dataset is in place, with data shared securely across systems so customers only have to provide their details or service request once
8. Customer journeys are simplified; teams understand their roles and responsibilities as part of joined-up processes; insight and feedback are used to manage demand and continuously improve services
9. A robust tenant feedback culture is maintained; complaints and compliments are welcomed equally as opportunities to improve, and outcomes support service delivery improvements
10. Colleagues work empathetically and provide safe, respectful environments for tenant conversations
11. All key actions in the Vulnerability and Reasonable Adjustments Policy are integrated into business as normal across frontline team activities

6. How will we get there?

The following 14 core actions will drive the strategy outcomes set out in section 5.2:

Project	Owned by
Understanding tenants and their diverse needs	
1. Data Governance: ensure data held at tenancy and home levels is captured in an accurate way at each point of contact. Implement mechanisms to evaluate and monitor data accuracy	Group Head of Performance & Risk
2. Develop analysis and insight approaches centred on customers (demand, journeys and personas) to provide clear data on transactions and help shape customer-centred service delivery	Group Head of Performance & Risk
3. Complete regular perception surveys to understand any emerging barriers to access and the customer experience, complementing results from TSMs	Group Head of Performance & Risk
Collaboration and communication	
4. Develop simple and clear principles for Torus teams to use when communicating with tenants	Group Head of Communications & Marketing
5. Establish and implement a meaningful consultation mechanism centred on access and experience approaches, to ensure services are designed around customer needs	Tenant Voice Team Leader
6. Develop clear processes for joint working between teams, including outlines of every team role and responsibility, to ensure consistent and timely information is provided across all access channels	Group Director of Housing and Group Director of Assets
Systems and processes	
7. Develop access channels and accessibility choices for tenants, focused on vulnerabilities and overcoming barriers to access, in line with the Vulnerability and Reasonable Adjustments Policy	Group Head of Communications & Marketing
8. Develop internal systems to provide a single view of the customer, reducing process duplication and unlocking clearer customer pathways	Tenant Voice Team Leader
9. Launch an improved online customer portal and app with end-to-end customer processes, making more transactions accessible online	Group Director of Housing and Group Director of Assets

Project	Owned by
Culture, behaviour and common practices	
10. Actively drive culture change to put the customer at the heart of service delivery. All colleagues will strive to meet tenant requirements and expectations, as well as future practices and legislation. This will support colleagues to adopt behaviours and mindsets consistent with Torus' objectives and values	Group Director of Housing
11. Identify and tackle skills gaps wherever they exist, linked to the Torus Competency Framework	Group Director of Housing and Group Director of Assets
12. Roll out additional training for key customer access areas, including Customer Services and Equality and Inclusion	Chief Operating Officer
13. Increase Neighbourhood Officer presence in neighbourhoods and work to do likewise with other key frontline roles within available resources	Director of Housing Services for Neighbourhoods
14. Implement and embed the Vulnerability and Reasonable Adjustments Policy	Group Director of Housing and Group Director of Assets

6.1. Monitoring and evaluation

Monitoring and evaluation will be key to implementing this strategy and will be driven by a commitment to quarterly insight reporting, tied to the Government's Tenant Satisfaction Measures Standard.

Progress with the strategy will be measured in three different ways:

1. Implementation and outcomes relating to each of the 14 actions shown in section 6, above
2. Satisfaction scores relating to the following six tenant satisfaction measures, recognising that customer experience approaches will have an impact on satisfaction but that wider business responses also play a role. Torus collects and reports against the TSMs on a quarterly basis:
 - **TP06:** Satisfaction that the landlord listens to tenant views and acts upon them
 - **TP07:** Satisfaction that the landlord keeps tenants informed about things that matter to them
 - **TP08:** Agreement that the landlord treats tenants fairly and with respect
 - **TP09:** Satisfaction with the landlord's approach to handling complaints
 - **CH01:** Complaints relative to the size of the landlord
 - **CH02:** Complaints responded to within Complaint Handling Code timescales
3. Compliance rates against Torus' service standards and customer experience principles