

## Mystery Shopping at Newlon Housing Trust

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The Mystery Shopper's handbook

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## **1. Aims and Objectives of this guide**

Using this guide, Mystery Shoppers will:

- Understand the context of Mystery Shopping at Newlon Housing Trust (Newlon);
- Explore elements of good service delivery;
- Explore what is involved in being a Mystery Shopper;
- Look at how Mystery Shopping can highlight key issues relating to organisational performance through telephone and internet-based contact;
- Feel prepared for and be comfortable completing a Mystery Shopping exercise.

## **2. What is Mystery Shopping?**

Mystery Shopping is a form of market research which assesses services wholly from the point of view of customers, in this case our residents; Mystery Shopping can play a key role in:

- Monitoring equal access to services;
- Establishing whether good practice within Newlon is being followed in day-to-day transactions with residents.

### **a. Mystery inspections by Telephone**

This method of reality checking involves ringing in, posing as yourself, to find out how well and quickly phones are answered and how appropriately queries are responded to.

Housing organisations often have standards for telephone responses and sometimes have standard procedural guidelines for staff to follow when responding to queries. They not only measure response time and accuracy but listening skills and professionalism as well.

Having a prompt sheet or scenario to follow can be a comforting prop to help Mystery Shoppers cope with any nervousness. This also assists with consistency in measuring the quality of the telephone call.

### **b. Mystery inspections by email**

This method of reality checking involves emailing in, posing as yourself, to find out how well queries are dealt with and if you receive a timely response. Things that are measured as well as timeliness include grammar and empathy.

### **3. Mystery Shopping in Context at Newlon**

We have been involving residents as Mystery Shoppers of the Housing Services team for a long time. The Service Centre Team respond to and action many of the housing and tenancy enquiries, including repair requests, mutual exchange requests and a wide range of applications and permissions. We also have specialist teams, for example Income and Investigation, Lettings and Neighbourhoods. We have Newlon Service Standards along with 2-ten, and many Knowledge Based articles (KBAs) for staff which are regularly updated, which are explained below. These are all designed to assist staff to work to a consistently high standard, and Mystery Shopping is about checking where there are issues and putting into practice ways of making improvements.

### **4. What do Newlon Service Standards mean in practice?**

These Standards tell you what you can expect from us in terms of the services we provide, the deadlines we work to, and the way you are treated.

#### **4.1 2-ten**

If you contact us about any service by phone or by using one of our email addresses listed below we will:

- Respond within two working days;
- Give you a full reply within 10 working days;
- Aim to respond to you within these timescales and most enquiries will be dealt with more quickly;
- Aim to answer your call quickly and deal with your query at the first point of contact. Where we cannot respond to your call quickly, we will provide you with the option of Qbuster whereby we will phone you back when staff become available;
- There may be some complex queries which we cannot deal with within these timescales. In these cases we will let you know within 10 days when we will be able to respond to you in full.

#### **4.2 Other methods**

Newlon regards mystery shopping as one way of checking the quality of our service standards and our adherence to 2-ten. We use other methods to assess whether staff adhered to the 2-ten standards, and these include:

- Monthly Quality Audits;
- Cases monitored on Dynamics (Customer Relationship Management system – referred to by most Newlon staff as CRM, which includes resident's details). The CRM system allows us to track every interaction that is entered into it under a resident's contact details – phone conversations, emails, notes of what was said, what action was agreed or should be taken;

- Qbuster –we check the percentage of customers who have received a call back after making a request;
- Mystery Shoppers test the service by phoning or emailing us with basic enquiries, gauging responsiveness;
- Newlon Gold – this measures our level of professionalism, empathy, listening skills and interdepartmental cooperation;
- An independent research agency conducts customer telephone surveys as part of providing data for the Tenant Satisfaction Measures (TSMs) required by the Regulator of Social Housing. TSMs provide residents with greater transparency about their landlord's performance.

## 5. Our approach to customer service

### 5.1 Newlon Gold

Newlon's commitment can be described using the 'Newlon Gold ABC':

- **A**lways dealing with customer enquiries;
- **B**eing clear what we are doing;
- **C**hecking we got it right.

Taking ownership and responsibility lie at the heart of Newlon Gold and are a key part of Newlon's core values – it is this that Mystery Shopping will measure.

The objectives of Newlon Gold are:

- **Reliability** - To deliver what we promise and let people know if we have to change it;
- **Consistency** - We aim to give the same correct response irrespective of which member of staff you speak to;
- **Speed** - Doing things as quickly as possible, delivering a service not just an acknowledgement;
- **Awareness** - We know when we have made mistakes, and we learn from them.

How we measure that Newlon Gold ABC is adhered to:

- The Service Centre Manager checks to see whether Service Centre staff have offered correct solutions, proper explanations and gave clear time scales on inbound calls and emails;
- Quality Audits checks that our handling of cases has been correct and there is consistency;
- Mystery Shoppers check our approach, professionalism, and empathy;
- An independent research agency gives us some external validation on how well residents perceive that we are doing in relation to the Newlon Gold ABC standard when carrying out TSM surveys.

## **5.2 Trust Newlon**

Trust Newlon is an organisation wide initiative that focuses on rebuilding the trust with our tenants. Various aspects of it are relevant to Newlon's approach to customer service. The trust Newlon priorities are:

Delivering reliable repairs

- New approach for managing complex repairs;
- Technical repairs expertise in the Service Centre.

Being easy to deal with

- Deliver all services with respect, warmth and empathy;
- Run campaign to increase portal registration.

Improving our places

- Use estate inspection data to tackle long-term issues;
- Ensure proactive communications with residents on communal works.

Stable and lasting tenancies

- Improve liaison with residents on Service Charges;
- Improve responsiveness for security related repairs in ASB hotspots.

Staff have made their own commitments to being more empathetic in the work they do and their dealings with others. These have been displayed around Newlon House.

## **5.3 Knowledge Based Articles (KBAs)**

KBAs are held in a resource library that can be accessed by residents. There are common questions and answers to things such as your tenancy, services for communal areas, repairs and maintenance, information for homeowners, antisocial behaviour (ASB) and enforcement and permissions.

The KBAs are also readily available to staff through Dynamics CRM. Each KBA provides staff with clear guidance on how to answer and deal with a particular type of enquiry. The resource helps staff follow the correct protocol and helps with the consistency in our approach. We use KBAs to measure whether staff have offered the correct solution and proper explanations.

## **6. Preparation for a Mystery Shopping exercise**

Plan when you will undertake the scenarios so that you meet the deadline. It helps to make yourself a workback schedule.

Establish the purpose of the 'phone call' or 'email' enquiry.

Establish the standards that you are looking for – go through the scenario, if any guidelines have been provided for how the issue should be dealt with and go through the questions you need to answer on the recording form so that you are more aware of what information you are looking for.

Email scenarios should be undertaken first. Newlon staff have up to 10 working days to respond. Weekends are not counted and if you send the email in the evening it does not register until the next working day. 10 working days is two full weeks.

Telephone calls can take time. The Service Centre can experience high demand and call times can be long, so try and plan your calls at different times of the day.

For telephone calls, have pen and paper ready to hand. Make notes of:

- The telephone number you rang from;
- The dates and times you rang (and if more than once – record under comments);
- How long you waited before it was answered;
- Did you take the Qbuster option – the date and time you left your details;
- The time when you were called back or if your call was not returned;
- If you were placed on hold during the call - how long for and if this was more than once – how long for each time;
- Write down the name of the Service Centre Advisor;
- Use the form provided to register all the details when the call is over.

Some things are easy to monitor:

- “Did they answer by giving a greeting, their name, and asking how they could help me?”
- Or
- “How long did it take them to call me back?”

Some things will rely more heavily on your judgement:

- “Were they friendly and did they make me feel that they were interested?”
- Or
- “Did I feel listened to and were they empathetic?”

## **7. Guidelines for your phone or email enquiries**

### **7.1 Using your own identity**

You must use your own identity when making calls or sending emails, so staff members can give advice accordingly. From your correct name and address the advisor can see on our system if you are a tenant (and the type of tenancy), a

Shared Owner or a Leaseholder. Some schemes or blocks are managed by Newlon and others by a managing agent and so advice on services may differ.

Please note that the Mystery Shopping activities do not have any effect on your profile or property.

## 7.2 Answering all questions

Have a look through the worksheets to see what the detail is for each one and what you need to record on your sheet/electronically. Always supply answers to all the questions on the worksheet. If questions do not apply to you, you must select "not applicable or N/A" otherwise we may be in doubt as to how you intended to answer the question.

## 7.3 Testing an email scenario once

Each email scenario test should be conducted once only. If you do not receive the correct response to your enquiry in the first instance, do not pursue the enquiry any further.

## 7.4 Testing a telephone scenario more than once, if you fail to get through to us

If you do not get through and get the busy tone, you can contact us again but please record the date and times you attempted to make these calls. Your notes will help us trace where things are not working so well.

## 7.5 Late replies

If a staff member fails to respond within 10 working days, but later does so after you have submitted your worksheet, then please forward any email correspondence you received to the Resident Involvement Officer.

## 7.6 Reminders

If a staff member fails to respond to your enquiry after 10 working days, then please send one gentle reminder.

## 7.7 What you should do if repairs or works are raised in error

Unless it is a genuine repair enquiry, which are now reviewed by Mystery Shoppers, each scenario that we have asked you to test is a simple enquiry and should not lead to job(s) been raised. Where a member of staff attempts to raise a job, please decline the offer, saying you are busy and it is not convenient at the moment. Report the matter by email to the Resident Involvement Officer as soon as possible and we will follow up and ensure that the job is cancelled.

This does not apply if you were asked to report a genuine repair in your home or communal area as a Mystery Shopper. In that case a job should be raised.

## 7.8 Listening to calls

Where you carry out telephone call(s) we ask you to write down the telephone number that you made the call from. The Service Centre Manager randomly listens to calls so they can assess how advisors have handled the call.

Listening to calls helps us address staff training issues or/and amend the instruction that staff are supposed to follow. Please note that management will not be judging or assessing your part in the call, or your email. Your name, address or contact details will not be divulged to staff members.

## 7.9 Record the date and time of telephone calls and emails

It is important to record the date and time of your outgoing/incoming calls and emails, so we can trace the staff member on duty at the time. You need to forward your original email and the response that you received to the Resident Involvement Officer.

## 7.10 Immediately afterwards

Look over your records to check that they are complete, legible and include everything relevant before sending them to the Resident Involvement Officer.

## **8. Scenario examples**

Park near home (telephone Service Centre)

I bought a new car and wanted to park near home. How do I go about this?

Intermediate rent home (email Lettings team [homesandlettings@newlon.org.uk](mailto:homesandlettings@newlon.org.uk))

“My niece/nephew is a teacher and he/she wanted to find out how they can get an intermediate rented home?”

Youths loitering (email Income and Investigation team [asb@newlon.org.uk](mailto:asb@newlon.org.uk))

Last night I saw group of girls loitering and smoking out at the front garden. I am not sure if they are guests of one of the residents or from another nearby scheme. I hope they do not return tonight. I thought it was worth reporting this.

Password for rent statement (email Income and Investigation team [incomeandinvestigationsteam@newlon.org.uk](mailto:incomeandinvestigationsteam@newlon.org.uk))

I cannot remember my password for my rent statement, how do I get a new one?

Can I grow plants in communal areas? (email Neighbourhoods team [estates@newlon.org.uk](mailto:estates@newlon.org.uk))



## **9. Terms of Reference**

Aims of the role:

- To inspect services that Newlon provides, via telephone or email enquiry using a provided scenario, in order to help improve them;
- To help Newlon understand the views of residents on the quality of services delivered;
- To assist in developing and improving the Mystery Shopping process;
- To feedback experiences and views.

Objectives of the role:

- To provide information accurately and in a timely manner, when requested, to the Resident Involvement Officer, in order to measure the consistency of Newlon's service provision over time;
- To feed into learning that leads to improvements in resident satisfaction;
- To be part of a Mystery Shopping experience that is always looking to improve.

## **10. Code of Conduct**

As a Mystery Shopper, your role is to carry out detailed and robust assessments of the services provided by Newlon Housing Trust. We expect you to:

- Treat contractors and officers with respect and be inclusive;
- Respect the confidentiality of Newlon Housing Trust;
- Treat all information you receive as confidential - you should only share any information that you collect about the service with the Resident Involvement Officer, who is your mystery shopping contact. You should not share information about members of staff's personal identities or the scenarios conducted with other staff or residents;
- If you are in any doubt about whether something is confidential or not, please ask your mystery shopping contact;
- Work to an agreed timetable and plan for the inspection. You will need to be prepared to carry out telephone surveys during weekdays and send emails and complete your forms at the weekend, where necessary;
- Use plain language throughout the exercise;
- Be specific and stick to the boundaries of the agreed area of exercise. Avoid preconceptions and be professional, objective, and non-biased when evaluating the service;
- Any conflict of interest must be declared.