

## **Appendix A – Customer Journey**

### **Introduction**

The HRA will change the ethos under which housing services operate. It was decided to re-examine the customer journey and look to see if a different model could improve the process for customers and help the service meet the outcomes of both the Watford 2020 Vision and the Homeless Reduction Act 2017.

The service created a number of personas that describe a variety of customers with various profiles and different issues. The service then created “to be” journeys for those personas that described what we saw as the ideal journey. These journeys led us to create an ideal overall journey with variations for different customers. This ideal journey was drawn up as a service blueprint. This led to the identification of questions we need to answer and clustered critical moments and ideas to potentially resolve them as well as the development of a problem statement that develops strategic themes and tactical solutions.

An example of one of these “personas” can be seen overleaf

Hafiz Family - Customer Journey



Hafid and Ayisha are a young couple aged 27 and 25 who have a 3 year old baby girl Kaamil. They are currently renting a 1 bedroom flat in Watford but are being evicted as the landlord wants the property back for her own use. They have received a section 21 notice. They have no rent arrears and have been in the property for 6 years. Hafid works as a taxi driver, his car is purchased on finance and is essential for his work. They are just about managing and have no debts or county court judgements. There only credit agreement is for the car. The pair have no savings and although they expect to get their deposit back it no longer represents the average deposit for Watford. In any case they do not see how they can come up with the deposit and customary month in advance.

	Initial Enquiry		Process Application		Appointment		Case Management
	Search Online	Phone Enquiry / Face to Face	Online Application	Initial Triage	Pre Appointment Work	Appointment	Monitoring
Key Activities	Review content on housing website for options and advice.	Calls customer services or comes to customer service centre. Talked through the process. Redirected to web site.	Complete online enquiry, providing details relevant to the application. Upload relevant documents	<ul style="list-style-type: none"> <li>Review application and ensure all documentation in place.</li> <li>Check legality of any eviction notices.</li> <li>Contact and liaise with landlord.</li> <li>Ensure applicant goes on housing register.</li> <li>Liaise with relevant council teams.</li> <li>Clarifying income and expenditure.</li> <li>Potentially prevent homelessness.</li> <li>Book appointment with housing caseworker.</li> </ul>	<ul style="list-style-type: none"> <li>Review case details.</li> <li>Negotiate with landlord.</li> <li>Review and add to lessons learnt log.</li> <li>Confirm details of case.</li> <li>Confirm appointment.</li> <li>Review outline PHP</li> <li>Identify third parties or experts who can add value to plan production</li> </ul>	<ul style="list-style-type: none"> <li>Go through case</li> <li>Create PHP</li> <li>Get customer to sign and agree PHP</li> <li>Potentially prevent homelessness</li> <li>Make referrals</li> </ul>	<ul style="list-style-type: none"> <li>Check on delivery against customers plan</li> <li>Check effectiveness of referrals</li> <li>Update plan</li> <li>Discharge duty</li> </ul>
Mood	Anxious Worried	Anxious Worried	Anxious Worried Hopeful	Anxious Worried Hopeful Relieved	Anxious Worried Hopeful Relieved	Overwhelmed Worried Anxious Relieved Positive	Overwhelmed Worried Anxious Relieved Positive
Touch Points							
Opportunities	Can provide advice which might be applicable.  Opportunity to signpost to agencies that can help or redirect to third party property websites.  If they can not resolve the issue then the customer can commence their online application.	Opportunity to reassure.  Commence management of customer expectations.	Online process negates need to have physical staff in the housing service.  Potential reduced accommodation requirements.	Potentially prevent homelessness  Identify opportunities for caseworker to progress	Potentially prevent homelessness  Identify experts / third parties to get involved  Identify lessons learnt to improve service	Increase customer understanding of options  Manage customer expectations  Move customer to more proactive position  Hold at accommodation of applicant	Prevent homelessness  Discharge Duty  Manage Expectations

These individual customer journeys were taken and aggregated to find the common points and an ideal summary customer journey produced. This summary journey is the one we expect most applicants to follow. Where it is not suitable for customers to go through this summary journey we will identify them early and look to manage the customer in the most appropriate way.

### **Key Points on the Summary Journey**

Multiple entry points into the service are available.

All entry points lead to the creation of an online application whether by the applicant or through supported or mediated self-serve.

Online applications will be routed through a triage team.

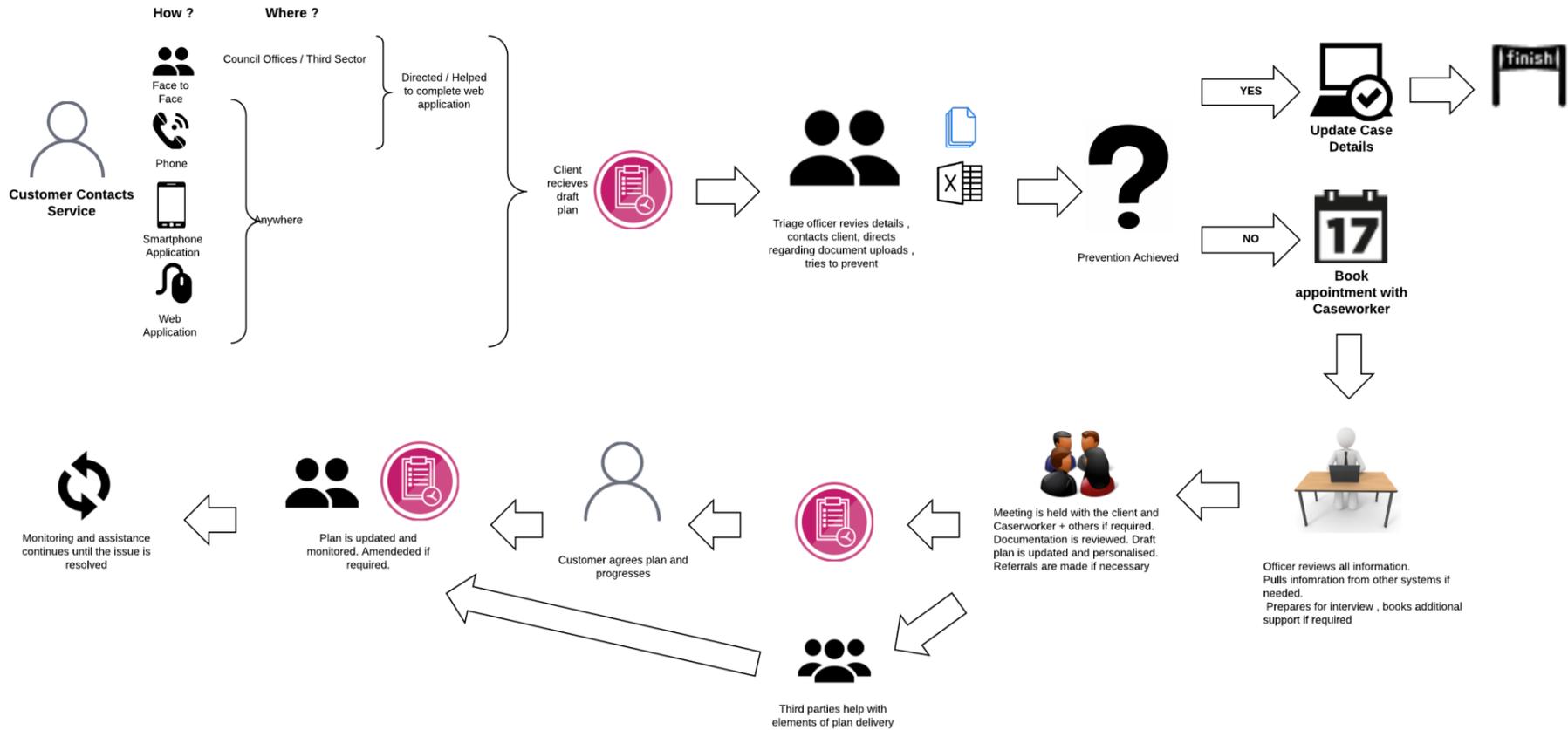
Triage team will take the application and either be able to actively prevent or they will ensure that sufficient information and documentation are collected from the customer to enable the case to go forward into casework.

Where casework needs to be undertaken it will do so in the form of a managed appointment.

Casework will be undertaken by suitability qualified housing staff with the assistance of third party partners if it is felt this could be valuable to the client.

Casework will lead to the production of a personal housing plan which will be monitored for delivery in line with the requirements of the Homeless Reduction Act 2017.

# The Summary Journey



**Legend**

	<b>Step definition</b>
	<b>Hidden step definition</b>
	<b>Touchpoint</b>
	<b>Actor</b>
	<b>System</b>
	<b>Policy</b>
	<b>Observation / Fact</b>
	<b>Metric / Data</b>
	<b>Question / Unknown</b>
	<b>Critical Moment</b>
	<b>Idea / Opportunity</b>

	1	2	3	4	5	6	7	8	9
	Initial Application		Triage			Pre-appointment	Appointment	Monitoring	
<b>Step definition</b>	Customer makes initial contact regarding homelessness	Initial triage as to where customer needs to be routed	Triage officer contacts customer and prompts to complete fully and upload document	Triage officer communicates with stakeholders to try and prevent homelessness	Triage officer makes appointment	Caseworker reviews the case prior to interview	Confirm and check facts. Produce and agree PHP	Updating of plan	Monitoring of plan
<b>Hidden step definition</b>									
<b>Touchpoint</b>	<ul style="list-style-type: none"> <li>Online</li> <li>Customer Service Centre</li> <li>Approved partner location</li> </ul>	<ul style="list-style-type: none"> <li>Back office</li> <li>At point of presentation</li> </ul>	<ul style="list-style-type: none"> <li>Online</li> <li>Phone</li> <li>Face to Face</li> </ul>	<ul style="list-style-type: none"> <li>Phone</li> </ul>	<ul style="list-style-type: none"> <li>Online</li> <li>Phone</li> <li>Face to Face</li> </ul>	<ul style="list-style-type: none"> <li>May make contact with client or 3rd parties to confirm facts, prevent or seek attendance</li> </ul>	<ul style="list-style-type: none"> <li>Face to Face interview</li> </ul>	<ul style="list-style-type: none"> <li>Online</li> <li>Face to Face at third parties</li> </ul>	<ul style="list-style-type: none"> <li>Online</li> </ul>
<b>Actor</b>	Customer	<ul style="list-style-type: none"> <li>Customer</li> <li>Triage Officer</li> </ul>	<ul style="list-style-type: none"> <li>Customer</li> <li>Triage Officer</li> </ul>	<ul style="list-style-type: none"> <li>Triage Officer</li> <li>Landlord</li> <li>Benefits Team</li> <li>DWP</li> <li>Environmental Health</li> <li>Social Services</li> <li>ASB Team</li> <li>Police</li> </ul>	<ul style="list-style-type: none"> <li>Customer</li> <li>Triage Officer</li> </ul>	<ul style="list-style-type: none"> <li>Customer</li> <li>Triage Officer</li> <li>Caseworker</li> <li>Third Party</li> </ul>	<ul style="list-style-type: none"> <li>Customer</li> <li>Caseworker</li> <li>Third Party</li> </ul>	<ul style="list-style-type: none"> <li>Customer</li> <li>Caseworker</li> <li>Third Party</li> </ul>	<ul style="list-style-type: none"> <li>Caseworker</li> <li>Housing Manager</li> </ul>
<b>System</b>	<ul style="list-style-type: none"> <li>Councils homeless system</li> <li>Partners IT System</li> </ul>	Councils homeless system	Councils homeless system	<ul style="list-style-type: none"> <li>Councils homeless system</li> <li>Benefits System</li> <li>Rent Deposit Checker</li> </ul>	Councils homeless system	<ul style="list-style-type: none"> <li>Councils homeless system</li> <li>Outlook diaries</li> </ul>	<ul style="list-style-type: none"> <li>Councils homeless system</li> <li>Ad Hoc tools</li> </ul>	Councils homeless system	Councils homeless system
<b>Policy</b>	Customers must complete an online application	Complexity and age will determine where the case will go	Full details and min document requirements needed to move to appointment stage	<ul style="list-style-type: none"> <li>Councils homeless system</li> <li>Benefits System</li> <li>Rent Deposit Checker</li> </ul>	Caseworkers must keep diaries up to date on system	Need to manage customer expectations	Plans must be agreed or reason for non agreement recorded	Not sticking to plan could be a reason for discharge of duty or lead to review	Manager will monitor caseloads and ensure timescales kept to
<b>Observation / Fact</b>	If necessary the online application will be made with mediated support	<ul style="list-style-type: none"> <li>Under 24 &gt; hyh</li> <li>Complex &gt; IT</li> <li>Simple &gt; Council</li> <li>DV &gt; Refuge</li> </ul>	Failure to provide required documentation could cause process failure	Triage Officer updates online account and plan if relevant	Appointments 18 to 27 a week	How do we ensure early warning of need to have third parties there for appointments	As part of production of the PHP referrals may be made to third parties	Would be useful if agencies working with customer could update plan	Caseworker will need to proactively monitor case and perhaps intervene
<b>Metric / Data</b>	Presentations 25 - 34 a week	Presentations 25 to 34 a week	What use could we make of other council systems i.e. benefits	Triage prevents if possible or ensures everything ready for a clean interview	What will diary availability look like. Will we schedule diarisable slots in caseworkers diaries	Use draft plan to commence management of expectations	What will referral routes and joint working protocols look like	How do we resolve data protection agreements between various partners	Manager will be reviewing and perhaps prompting caseworkers
<b>Question / Unknown</b>	What appetite do our partners have to carry out this process on our behalf	Can we create an algorithm to determine where client will go ?		Will partners be prepared to update our systems	How do we prioritise clients for diary slots. Probably not FIFO	Shared access and shared use of systems	Need to understand ROI on interventions v cost of TA	Early warning and monitoring of plan and non compliance vital	How do we strike the right balance between system prompts and notifications . proactive v passive monitoring
<b>Critical Moment</b>	What will volumes be and what will the split be between council / partners	For clean journeys customers need to be routed correctly		Approved partner model only works if they are prepared to update our systems	CSF - Availability of diary slots within prevention period	Co Location	Effective partnership working and effective sharing of resources	How do we incentivise customers to update and progress their plan	Early warning and monitoring of plan and non compliance vital
<b>Idea / Opportunity</b>	Need to ensure customers have access to computer systems & ability to upload documents	Need to ensure sufficient capacity to deal with right volumes at the right place		Use api's to feed from partner system to ours	Could customers book their own appointments in the long term ?		Create costed intervention toolkit	Need to have timelines and notifications / dashboard warnings	
	Provide device to allow customers to upload documents if they don't have their own methods	Need to clearly communicate to customers what housing routes are			Could we produce a forecasting model		Create directory of resources	Clear communication around consequences of not updating plan	
		Mobile housing workers who can flex to demand					Co Location	Gamification of plan	

