



Digital Transformation

Persona Journey Mapping

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Distribution

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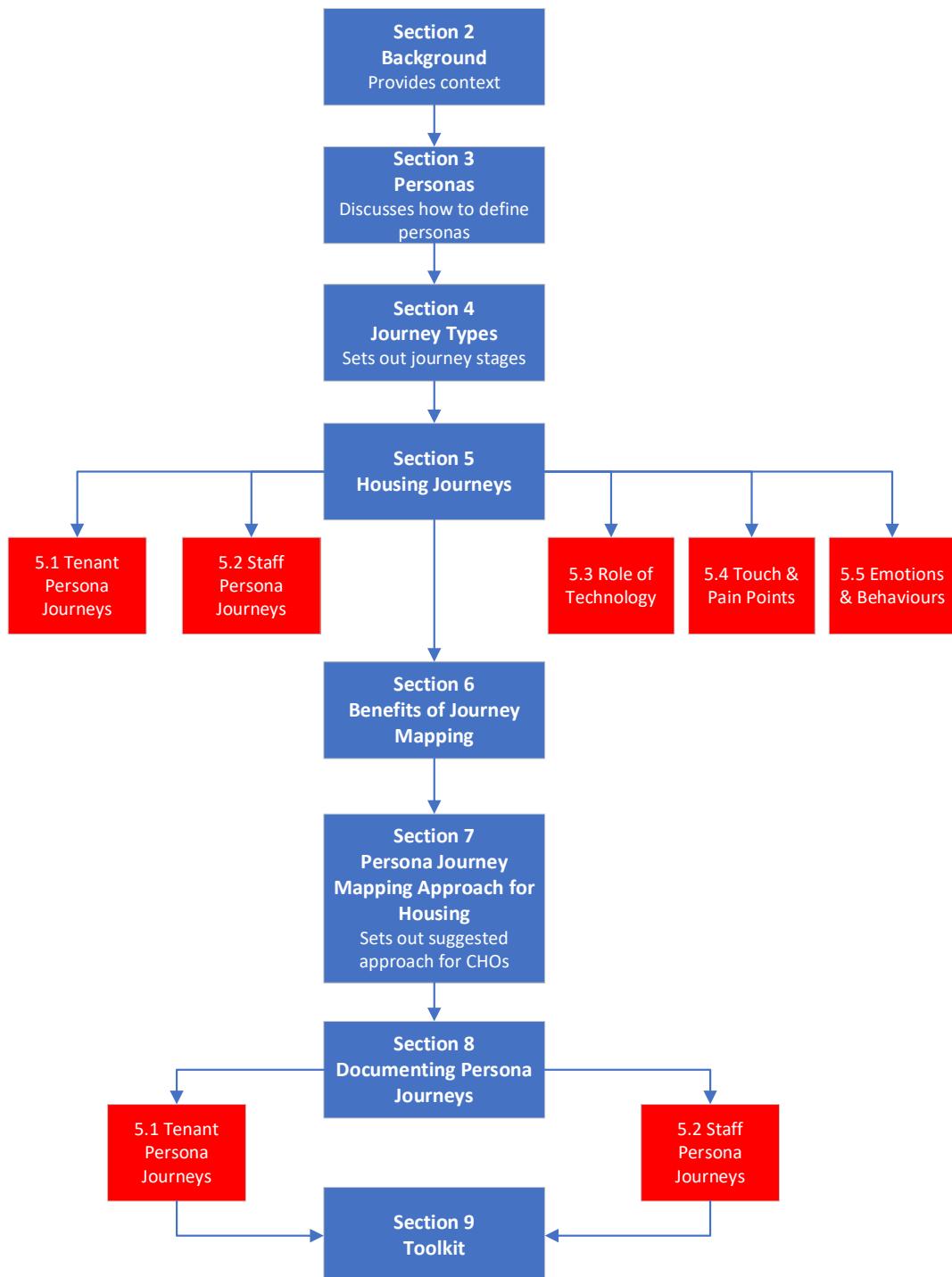
1. Introduction

This document sets out guidance, combined with links to an Excel toolkit, to help community housing organisations (CHOs) understand what persona journey mapping comprises.

It explores how persona journey mapping has been used across various industries to measure and understand customer experience in relation to service delivery

It provides suggestions on the content and approaches CHOs can use in undertaking persona journey mapping exercises.

The flow of this document is as follows:



2. Background

Across many industries, depending on the nature of what they are seeking or asking, customers very often may experience straightforward paths to achieve what they want from a supplier, provider or service-related agency, such that they may be pleased or impressed with the quality of service or product and will more likely return to that supplier for future purchases e.g. when buying clothing, retail appliances or in maintaining a service through regular payments e.g. phone, power, internet etc.

"I love the quality of their clothing"

"Their products offer terrific value for money"

"Their level of service is excellent"

"I always get fantastic service when I shop there"

"They sell products I want"

Conversely, some customers may encounter long, uncertain, unpredictable avenues in seeking their desired outcomes, which may result in a range of emotional feelings – anxiety, worry, frustration, annoyance to name but a few – and which have an adverse impact on their customer experience, such that they may either never contact that supplier again, look to move to alternative suppliers or are enticed or persuaded to move to another supplier (the inducements of power and telco companies being good examples)

A customer experience is all about moments of connection and journey maps can be used to create a holistic view of customer experience as well as supporting or testing the merits of a specific business goal.

"I'll never, ever go there again"

"The level of service was appalling"

"Thanks, but I'll look elsewhere"

"I've found what I want for a much better price"

Understanding why these outcomes happen are vitally important to organisations in determining how they provide customer services.

Housing is no different, but in view of the diversities as to the range of services being provided and the types of situations that occur, knowing why these outcomes occur can be complex.

To do this the use of personas is the starting point.

Buyer personas have been used across many industries for years to identify customer needs and help understand how customers make purchasing decisions.

Have you ever wondered why you are asked to enter your age range and / or your interests when filling in any customer surveys?

Companies use such data to target products and services so they reach the right people.

Not only is a persona used to describe **who** the customer is, a persona is also used to identify **why** certain people feel the way they do in certain situations.

A persona therefore is used to describe or define the type of person that a customer is e.g., what demographic are you; how old are you; what are your preferences; where do you live; what is your financial situation etc?

A journey map is the story of what happens along the way in the interaction with the provider, how it happens, areas where pain points arise and how the persona **feels**.

The journey map is designed to show what customers do in the moments of connection and interaction with the product supplier and how they feel, what their behaviours are and whether they are satisfied.

Likewise, it is also important to understand what happens within the organisation in response to a situation arising or an issue being reported and what happens in how the outcome is communicated.

For CHOs, the specific business goal in customer journey mapping in this instance is not only to understand journeys in specific situations but to also determine how digital transformation can improve current contact channels and their service capabilities by:

1. Providing an enhanced customer experience for tenants in terms of how enquiries and service requests are responded to and resolved, as well as the time taken in doing so.
2. Improving internal procedures and efficiencies for staff in undertaking a range of operational tasks.

Using types of personas, the purpose of journey mapping is to understand what happens from the very first touchpoint through to the end point of whatever transaction or enquiry is being made, rather than guessing or assuming what the customer needs and how the service should be provided.

This can only be assessed by analysing current practice across a range of typical operational scenarios, what happens now; how personas feel about what happens now; what personas would like to see improved; the extent to which digital can support such improvements and how people need to be supported who do not have access to digital tools.

Before something is designed or built to serve as a solution, we should first know what the problem is that we are solving and for whom.

Put it another way, and this question also features further below, if digital is the solution, what is the problem?

3. Personas

Defining personas is a vitally important aspect in the overall journey mapping process and can help identify how different people interact with each CHO.

In the commercial sector, various marketing agencies and sources suggest:

1. A persona name – ensure you make it personal and put a human feel to the persona e.g., Michelle, aged 66 who has been a tenant of ours for 23 years or Dave, our Tenancy Manager who has been providing a vital role for our organisation for 5 years etc.
2. Images or photos are typically suggested to put a human flavour to the journey
3. Bringing the persona to life by using engaging, first-person narratives which are realistic interpretations of each persona being used based around a range of attributes

These attributes can include:

| Attribute | Factors |
|--------------|--|
| Demographics | <ul style="list-style-type: none"> • Age • Location • Education • Income • Household • Family size |
| Personal | Goals, needs and interests of the persona when interacting with the CHO |
| Lifecycle | How the persona's needs may vary for different channels and touch points and how these may evolve over time |

Defining personas can help assess customer-centric practices in various ways. As community housing is a service-driven people-based operation, CHOs should already have a good knowledge of the demographic breakdown of tenants, households and communities across their portfolios, and taking into account annual surveys which are undertaken, they may not necessarily know how they *feel* about the CHO in terms of how they interact and how they would *want* to interact.

Do CHOs know for example how people behave the way they do in certain situations? Has the business process been designed from a customer interactive perspective or has it been established in the way it has primarily to support internal operations?

In essence, the central theme for persona mapping in this context is:

As a [persona], I want or need to [do something] so that I can [derive a benefit]

In a housing situation, the journey mapping for each tenant persona is based on that pretext, e.g.

How a tenant persona interacts with their housing provider

As a tenant, I want to get my repair fixed on time, so I can live comfortably

As a tenant, I want my provider to take action against my anti-social neighbour, so I can sleep at night

As a person with a disability, I want my provider to ensure I have safe, easy access to my home

As an elderly person, I want my provider to respond to my needs promptly and diligently

A staff persona may be involved in a housing situation in various ways:

How a staff persona interacts with a tenant persona

"I need to resolve this enquiry"

"This is a delicate situation; this person needs help quickly"

"I need to process this service request"

"I need to get this done"

"I need to ensure this person is safe, I need to get other staff involved"

As we know, CHOs have a diverse client base and all provide equally diverse services and respond to diverse situations.

Each tenant persona may have different reactions and feelings to how services are provided and how their problem is being dealt with which then prompts questions such as:

1. What do you think of your provider?
2. How easy is it to contact them?
3. What are your challenges in contacting them?
4. Where is each interaction taking place e.g., in reception, phone call, home visit, social media?
5. How does that align to the means by which each tenant or household member *needs* or *wants* to contact their housing provider?
6. How do you typically contact them?
7. How long does it take them to respond?
8. What are the most important things that you want your provider to do in responding to any enquiry or service request you make?
9. What alternatives would you like to have available to you in how you contact them?
10. What's going on around the tenant or household member at each step? Are they worried, anxious, annoyed?
11. Is it challenging to actually contact their provider?

Consideration also needs to be given to staff personas within the organisation:

How the organisation delivers the service / resolves questions or problems

"As a housing provider, we want to deliver a quality service, so our tenants will think highly of us"

"As a customer-facing service desk officer, I want to be able to quickly resolve enquiries and service requests, so I can feel like I am making a difference in helping people"

Questions for CHO staff personas in terms of their journey in responding to tenants and household members or how they undertake internal operational tasks and procedures could include:

1. Person

- a. Tell me about being a [role] at [provider]
- b. How did you choose that line of work?
Why?

By including a human flavour to the persona mapping approach, many marketing agencies recommend starting any journey mapping with screening questions such as these

2. Operations

- a. What are the 5 biggest obstacles which make it difficult in how you:
 - i. Do your job?
 - ii. Deal with service requests made by tenants?
 - iii. Answer enquiries from tenants?
- b. How do you go about doing the things you do?
- c. What are your favourite tools for getting jobs done, information-wise?
- d. How are things done now vs. how would they work in a perfect world?
- e. What have you seen work well vs. not well on specific jobs?
- f. What's the best vs. worst job you've done recently and why?
- g. If you could change one thing, what would it be?

- h. What would make it better?
- i. What could be done to make the customer experience better for tenants?
- j. What motivates you in doing your job?
- k. What parts of it are most rewarding and why?
- l. How many enquiries did you resolve last week?
- m. How many thanks did you get?

3. Problem

- a. What are the biggest problems in how you do your job?
- b. What do think of how your organisation handles service requests and enquiries from tenants?
- c. What are the problems that really exist and what are important?
- d. What do tenants actually think about us and how we do things?
- e. What is preventing you from doing your job effectively?
- f. What improvements would make it better?
- g. If digital is the solution, what is the problem? Is digital a solution?
- h. What about those people who don't have digital access, how do we help or include them?

4. Proposition

- a. How would we make tenants aware of our new digital service offerings?
- b. How might we test whether they actually care about a new digital service offering?
- c. How often would we expect them to use a new digital channel?
- d. How do we measure success?

5. Service Design

- a. Who is our 'customer'?
- b. How do we make a digital channel usable for people with different needs?
- c. How often would they use it?
- d. How do we decide what is a good thing for our tenants to use?
- e. How will we know if it is?

A range of personas is proposed below across tenant demographics and across typical service-related roles in a CHO and a range of situations has been set out for where:

1. Applicants and tenants interact with the CHO, each having different touchpoints and therefore possible pain points
2. Staff undertake operational tasks which may involve inside-out communication with third party organisations and tenants

The following tenant and staff personas are proposed in order that journeys can be documented across a range of situations:

| Tenant | Tenant | Tenant | Tenant |
|-----------------|---------------|--------------------------|---------------------------|
| Younger than 30 | Older than 65 | Person with a disability | Main language not English |

| Staff | Staff | Staff | Staff |
|--------------------------------|-----------------|----------------------------|------------------|
| Customer-facing / service desk | Tenancy Manager | Housing Operations Manager | Property Manager |

4. Journey Types

Journey mapping may encompass different scenarios and they can therefore differ. For example, across different types of industries, different types of customer-related journeys can be defined to cover:

1. A buyer's journey (an example of this is set out below)
2. Current state (how do we do things now)
3. Lead nurturing (how do we nurture and secure leads)
4. Future state (what can we do to improve what we do and where do we want to be – how do people feel about that; what are our ideas)
5. A day in the customer's life
6. Introducing a new product and gauging how customers will react to it (will they buy it)
7. Customer churn (why do customers leave us)
8. Customer support (how do we best support customers in relation to x y z etc)

For commercial companies, specific drivers can be identified for each type of journey as shown in the table below. Comparisons are provided as to how these types could be applied to community housing:

| Purpose / Driver | Considerations |
|---------------------|---|
| Introductory / Grow | <p>The very first interaction can set a precedent for the relationship in terms of first impressions of what the level of service will be like.</p> <p>In community housing terms, this is no different and happens when the person applies for housing, either through a common housing register or directly with the CHO for specific affordable housing schemes.</p> |
| Onboard | <p>This is the moment or opportunity to build a deeper connection, starting off on the right foot e.g., where you buy a product and with good service, you are likely to return to purchase other goods or services.</p> <p>In community housing terms, this is the tenancy sign-up, providing the tenant with all the necessary information that the tenant will need and for the Tenancy Manager to set out how services will be provided</p> |
| Engage | <p>Commercial companies hold your contact details so they can send or email marketing literature or news about upcoming campaigns.</p> <p>The level to which tenants are engaged and the data which is held on their contact details, methods, preferences and household needs can be used to create and maintain compelling levels of engagement.</p> <p>Maintaining data and treating it like an asset is therefore vitally important.</p> |
| Service Responses | Delivering good service is essential for companies in retaining their customers and staying ahead of the competition. |

| Purpose / Driver | Considerations |
|------------------|---|
| | <p>The manner in which CHOs respond to enquiries or service request is vitally important to gauging how tenants feel about:</p> <ul style="list-style-type: none"> • the quality of service being provided; • how it is dealt with; • the manner of the response; • has the enquiry been answered satisfactorily; has something been done about the request or problem etc. • in what way could the CHO improve on how it delivers services and responds to enquiries and requests. |
| Retain | <p>This is particularly common in commercial service-related companies such as phone and power companies, identifying why a customer loses interest and moves elsewhere, and what is needed in retaining customers. It could be said that some commercial or utility companies focus more on enticing new customers with various attractive packages rather than retaining their existing ones.</p> <p>In community housing, tenants do of course terminate tenancies for a wide variety of reasons and analysis of termination reasons would set out why.</p> <p>Moving to another CHO is most probably a rarity, however, the possibility does exist that a tenant may be encouraged to find alternative housing due to e.g., poor levels of service or poor quality of maintenance being a factor.</p> |

In relation to the journey itself, the typical stages for a buyer are:

Awareness ➤ Research ➤ Selection ➤ Delivery ➤ Follow-up

The above is described in more detail as follows:

| Stage | Detail |
|--------------------------|---|
| Awareness | <p>The customer may not be looking for a product or solution at this stage, but is aware they may have a problem or desire and therefore need to buy a product or service to resolve the problem, but they may not necessarily know what yet and possibly have not had the time to explore further.</p> <p>The goal at this stage is to start thinking of things to look for as what you need to do to resolve the problem. Where can I find out x about y etc?</p> |
| Research / Consideration | <p>Having identified a desire, need or a problem, the customer would start to shop around, either in-store, phoning suppliers, shops etc or research online. Some may make decisions easily or spend hours doing it.</p> |
| Selection / Convert | <p>Having researched the product, possibly looking at market research websites and Google type reviews or by viewing the product in a shop and speaking to a sales consultant, the customer then makes an informed decision to buy it.</p> <p>The supplier will then want to form a relationship with the customer and record contact details etc to follow up on satisfaction and to market additional products</p> |

| Stage | Detail |
|----------------------|--|
| Delivery / Loyalty | The product may be collected at the store or may be delivered. In either situation, many suppliers or retailers want to know what your experience is so they know the chances of you becoming a repeat customer. |
| Follow-up / Advocacy | After a period of time, the supplier or retailer may seek feedback from you as to your satisfaction with all aspects of the service, seeking details on how it could be better. Subject to your responses, you may be deemed an occasional buyer or a full-blown advocate. |

As indicated above, different journey types can be defined to support different purposes such that each will be a variation on a theme in being adapted to the type of situation.

In that sense, housing journeys are no different and are a variation on the journey mapping theme i.e., determining how a persona feels about the experience along the way in response to what happened, what was done or what needs to be done.

5. Housing Journeys

5.1 Tenant Persona Journeys

For a CHO, the customer journey is the process by which a tenant (or a household member) interacts with it to achieve a specific goal. Typically, the tenant has a problem, needs advice or assistance in relation to a tenancy matter and / or wants to make a service request.

Traditionally, tenants contact their landlord by any of the following channels:

1. Office visit to front desk reception
2. In their home when the Tenancy Officer visits
3. By phone
4. By email
5. By SMS (if the CHO offers this service and technology allows two-way communication)

Some CHOs also provide contact facilities on their web site and some are exploring purposely-designed tenant portals. The digital readiness survey which has been issued as part of this project is designed to analyse the numbers of CHOs who are at this stage.

That request or enquiry is typically logged or recorded in an information system and a staff member is responsible for responding. CHOs may periodically distribute satisfaction surveys however the **manner** in which requests are handled and dealt with **may** have remained the same for many years. In many situations, there may well be no issues with this, and tenants are happy with the level of service being provided. There may be however other situations where the provider has its perceptions of how services are being provided and there may be some staff who have reservations as to how services are being provided.

In terms of the customer experience and based on the above, the purpose of a customer journey map is to therefore drill down into:

1. What is the person's first impression of the CHO?
2. What is their experience of the onboarding process?
3. How does the tenant feel about how they contact their provider?
4. How their enquiry or request is dealt with
5. How they are kept informed of progress
6. Whether it is successfully resolved
7. How they are treated by staff
8. Where are the pain points or hurdles which adversely impact the customer experience?
9. What could be better?
10. What is the level of engagement in the community?

A journey map is more than just where tenants go and what they do. It's about **experiences** they have along the way and how they **feel** about them.

In asking the above questions, when preparing the questions to be covered as part of the journey mapping exercise, it is equally important to discover the applicant or tenant's perspective and the CHO's perspective on the applicant or tenant. For this reason, the journey mapping template covers topics including:

1. How does the tenant **feel**?
2. Do **WE** (i.e., CHO staff) **know** how the tenant feels at a particular point in the journey?

In the retail world, a customer journey appears relatively simple. A company has x, y and z products, the customer wants to buy one of the products, considers the merits of each product and then makes a purchase. According to Salesforce, research show that 80% of customers now consider the experience a company provides to be as important as its products and services.¹ Interestingly, 76% of customers expect consistent interactions across departments, yet 54% have the perception that different departments do not use the same information or share it.

How true is this of community housing service delivery? As discussed in the part of this project which covers digital readiness, tenants do not have choice yet they should expect a quality of service and CHOs need to know how they **feel** about it. Surveys measure the level of satisfaction but what are their emotions? Are they content or frustrated and annoyed? It is important to visualise this as well as understanding it and this is where a customer journey map can help to identify emotions as well as experiences.

By compiling a visual representation of the customer's experience, it can provide an understanding into the needs and concerns of tenants which directly motivate or inhibit their actions and attitude towards the CHO as their landlord. Likewise, the same can apply to staff who need to respond to tenant enquiries and service requests or who otherwise undertake procedures relating to the enquiry or with third-party organisations such as maintenance contractors and suppliers.

This document sets out a range of tenant persona situations, some of which may be selected and used to workshop:

1. What happens in the respective journey from enquiry or request to resolution
2. Why it happens
3. How it happens
4. How the persona feels at each stage

¹ <https://www.salesforce.com/resources/articles/customer-expectations/>

5. The issues arising which should prompt learnings
6. What improvements can be drawn.

5.2 Staff Persona Journeys

When a tenant persona approaches their CHO for assistance or to make a service request, a CHO staff persona will become involved in some way, such as receiving the enquiry and processing it. Along the chain, other staff personas may become involved, subject to the nature of the situation, until the enquiry or request is resolved.

Other types of staff persona journeys also occur which may cover a range of activities. Many of these may have implications as to how digital transformation may offer benefits or improvements such as:

1. Rent calculation
2. Rent reviews
3. Property inspections
4. Tenancy inspections
5. Managing maintenance
6. Managing contractors and suppliers
7. Finance
 - a. Accounts receivable
 - b. Accounts payable
 - c. Reconciling accounts
 - d. Processing write-offs
 - e. Debt management
8. Human resources
 - a. Staff recruitment
 - b. Payroll

The journeys for any of the above may well differ, however, a consistent theme is that something i.e., a task or activity will need doing in response to a situation or a problem which is arising and which may well involve touchpoints within the organisation and with external stakeholders such as contractors, suppliers and agencies.

This document therefore sets out a range of internal journeys that occur.

It is important to distinguish between journey and process mapping. The key difference between the two is this: process maps describe what needs to be done by those **performing** the process, while journey maps are built around those **experiencing** particular points in a process or the end result of a process.²

With digital transformation offering the potential to design an improved service or offer additional service channels, and with the goal of identifying whether the end recipient (i.e., a tenant persona or an external persona) will use it and how, the CHO is in effect designing a combination of an end product, experience AND service combined.

² <https://www.digital-adoption.com/process-map/#:~:text=The%20key%20difference%20between%20the,end%20result%20of%20a%20process>.

In determining the reaction to the implementation of digital initiatives, a journey map is therefore more appropriate, as the key aspect of this is the experience. This experience applies to tenant personas and staff personas alike.

In both cases, the statement '***As a [persona], I want or need to [do something] so that I can [derive a benefit]***' equally applies.

For the staff persona, the benefit is ***how best or how easily can I get x y z done?***

5.3 Role of Technology

Technology of course plays a vital part in supporting the customer journey. Many buyers typically research products online, read product reviews online and then will either buy online or visit a store to know more about the product.

Many retailers provide chatbot functionality to answer enquiries which is also used as an early stage in the onboarding process to firstly answer customer questions but more importantly get to know who the customer is, gain their contact details and gain their confidence that the product will meet what the customer is seeking. Thereafter, once the product is purchased, with many products, gone are the days when the buyer sends the product warranty card to the manufacturer through the post. Typically, the warranty is registered online so the buyer and supplier have an electronic record which is much more easily retrievable.

In utilising technology, the Digital Clarity Group provides the following definition of customer journey mapping:³

"An organisation's plan to apply resources to engage and delight customers by supporting all touchpoints that span discovery, sales, finance, support, and service, and by integrating the multiple devices, interaction channels, and application silos that support those customer touchpoints."

Adapting this to the community housing sector, an alternative definition could therefore be defined as:

"a CHO's plan to apply resources to engage and delight applicants and tenants by professionally supporting all touchpoints which span applications for housing; housing advice; tenancy management services; asset maintenance services and community engagement activities by integrating the multiple devices, interaction channels, and software applications that support those customer touchpoints through a collaborative customer service approach."

5.4 Touch and Pain Points

By understanding the customer journey in relation to specific types of operational scenarios, the CHO can identify pain points and structure touchpoints to create the most effective and efficient process for their tenants. They can also be used to identify where digital technology can be utilised to improve or smooth the process.

These touchpoints also have an impact on the internal processes that support the interaction or which prompt tasks and actions that need to be taken by the organisation to answer the enquiry or do something about the service request.

³ <http://www.digitalclaritygroup.com/journey-strategies-and-customer-experience/>

In regards to the latter, a good example is the repair request process:

1. Tenant finds or discovers a maintenance related problem in their home which needs fixing (and which may need fixing urgently).
2. Tenant may consult the tenancy handbook provided by the CHO to find out what to do or may decide to immediately contact the CHO to report the problem, acknowledging the possibility that the tenant may not be able to find where they put the handbook in their home.
3. Tenant contacts CHO to request a repair by a traditional contact method (phone, office visit, email).
4. Depending on who receives the contact in the CHO (customer service desk, tenancy officer, clerical team and so on), the officer does something with it e.g., refers it to somebody who can raise the repair or who needs to inspect first or raises the repair order directly at that point.
5. The repair request is logged in the information system (irrespective of the terminology used by that system) and is processed to a work order (noting this may need authorising by a manager before it can be issued) and which is then issued electronically to a contractor.
6. Based on the contact details provided in the repair request, the contractor contacts the tenant to arrange access (or maybe does not) and visits the property with an arranged appointment or on the off-chance that the tenant is at home.
7. The contractor completes the repair or discovers additional work which requires a variation
8. If it is a variation, the contractor requests authorisation to do the additional work either when on-site or after returning to base.
9. The CHO receives the variation request and may either approve it immediately or may need to consult internally to determine what to do.
10. Once authorised the contractor is notified
11. The contractor then re-visits the property (possibly making an appointment) and the additional work is done and the work is completed
12. At each point in the above journey, something may happen which may delay completion of the work such that the tenant may not necessarily be informed that there is a delay and why. For example, if the variation request may need consideration by the CHO whether to do it which may involve internal discussion.
13. The tenant then calls the office to find out what is happening, but maybe the variation request has not been properly logged in the information system so nobody knows what the status of the work is.
14. Frustration then grows and the tenant requests somebody in the CHO to clarify the situation when the work will be done.
15. The work is then done but the tenant is not happy with the quality so calls the office again to complain. Frustration is increasing.
16. The CHO contacts the contractor and needs to keep the tenant information when the defect will be remedied.
17. The contractor makes arrangements to re-visit (or possibly not) and the work is then completed.
18. The tenant is provided with a satisfaction slip and returns it to the CHO setting out he or she is dissatisfied with the quality of work.

As indicated, various emotions and behaviours can possibly arise due to the nature of any particular situation.

5.5 Emotions and Behaviours

So, we know what happens in the type of scenario listed in the previous section, but from an emotive perspective, the customer journey map needs to identify how the tenant felt when:

1. Lodging the repair request
 - a. How easy was it?
 - b. How was the request handled?
 - c. Was the information clear?
 - d. Did the tenant know when it was likely to be completed?
2. Calling to ask what was happening to the repair request
3. The repair was delayed due to a variation being needed
4. The work was completed and the quality of the work was poor
5. Completing the tenant satisfaction form

The above experience, if this is common, should lead to an assessment as to where improvements could be made and where technology could support such improvements. Every interaction should be analysed to offer the best experience possible by examining metrics for what is and what is not working. If the experience is bad or the situation is causing problems, this highlights the need to assess how best to design and offer a more positive experience.

So, for example, from an outside-in perspective (i.e., the tenant contacting the CHO), digital technology potentially offers an improvement where the tenant **could** have logged the repair online on their smartphone and with back-office integration, the status of the work order on its journey **would** be clearly displayed on the digital portal that the tenant used to log the repair.

From the inside-out perspective (i.e., the CHO contacting the tenant), the CHO needs to communicate with the tenant, ensure information is updated in the information system and liaise with the contractor to ensure the work is done. Digital technology to support this could include a contractor portal to ensure structured communication as well as task-oriented workflow software that is used to support the work order process from start to finish and communications with the tenant being automatically logged with the tenant.

Subject to the structure of the CHO, e.g., if it has a silo departmental structure, cross-functional processes may be in place, where task-oriented workflow software could be configured to ensure that each respective stage of completing a work order is automatically displayed to the respective member of staff who is responsible for that stage. This also highlights the importance of journey mapping from an internal operational perspective.

In essence, this is a classic example of how digital transformation could support the analogy of 'online parcel tracking for community housing' i.e., the tenant could easily see the status of the work order that had been logged using a phone or tablet and where it was in the chain.

6. Benefits of Journey Mapping

Journey mapping offers a range of benefits that can be gleaned:



The Nielsen Norman Group, one of the world's leading market research companies, has identified the following benefits in undertaking customer journey mapping.⁴ In the table below, as part of this exercise, analogies have been provided as to how such benefits could be achieved by CHOs.

| Benefit | Impact |
|--|--|
| 1. Opportunity to change perspectives | Journey maps can contribute to introducing changes to the organisation's culture by re-focusing on thoughts, actions and customers, and shedding light on the human experience that CHOs know little about or take current practice for granted |
| 2. Transform from a silo approach to whole of organisation | As journey maps create a vision of the entire customer journey, they become a tool for creating cross-department conversation and collaboration. Journey mapping could be the first step in building an organisation-wide plan of action to invest in customer experience, as it helps answer the question, "Where do we start?" by highlighting areas of friction or |

⁴ <https://www.nngroup.com/articles/customer-journey-mapping/>

| Benefit | Impact |
|---|--|
| | frustration in who does what in response to various scenarios and how they do it |
| 3. Assign or re-assign ownership of key touchpoints | <p>Often, areas of inconsistencies and glitches in customer journeys exist simply because no internal team has been tasked with ownership of that element.</p> <p>Journey maps can create clarity around alignment of departments or groups with different stages or key touchpoints in the journey that need addressing.</p> |
| 4. Target specific customers | <p>Journey maps can help teams focus in on specific personas or customers, irrespective of:</p> <ul style="list-style-type: none"> • understanding differences or similarities across the journeys of multiple personas, • prioritising a high-value persona or • exploring ways to target a new type of customer |
| 5. Understand quantitative data | If business reporting is indicating that issues are being encountered in various aspects of service delivery, journey mapping can assist in discovering the reasons why. |

7. Persona Journey Mapping Approach for Housing

Section 2 provided examples of customer journey mapping in the commercial sector from a buyer's perspective.

A persona journey map for community housing is however different due to the types and diversity of services being provided and realistically would include the following stages in relation to the tenant persona of "**as a [tenant persona], I want or need to [do something] so that I can [derive a benefit]**":

Catalyst / cause ➤ Initial Action ➤ Progress ➤ Outcome ➤ Possible follow-up

A staff persona will receive the enquiry or service request and will need to take initial action(s) in as necessary, progress whatever has been reported by the tenant persona through to the point when there is an outcome. This is set out in more detail as follows:

| Stage | Detail |
|---|---|
| 1. Catalyst i.e., problem awareness / discovery / consideration | <p>This begins when the tenant knows or is aware they have a:</p> <ul style="list-style-type: none"> • Problem • Question • Issue • Need for assistance • Repair that needs fixing <p>Questions to consider at this stage could be:</p> <ol style="list-style-type: none"> 1. How do tenants or applicants describe their problems, questions or issues? 2. How could tenants or applicants find out things first before making contact? |

| Stage | Detail |
|--|--|
| | <p>3. What are the consequences of inaction by the tenant or applicant?</p> <p>4. Are there common misconceptions tenants have in addressing the problem or contacting the CHO for help?</p> <p>5. How do tenants prioritise the problem?</p> <p>Subject to the type of scenario, the journey may well differ in terms of who does what. A path needs to be drafted for each scenario in a swim-lane type context.</p> |
| 2. Initial actions – make enquiry / submit service request / seek help | <p>This details what the tenant does in each stage of the enquiry / service request process. They might:</p> <ul style="list-style-type: none"> • Need to speak with friends or family first about their problem i.e., what to do if it is not immediately apparent • Refer to their tenant handbook • Consult the CHO website for guidance • Consult a third-party website for information (e.g., a tenant rights group) • Speak to a tenancy officer or different officers first about the problem; report the problem; seek help for question or issue x y z etc |
| 3. Progress | <p>As the enquiry or service request progresses, various tasks within the organisation will likely need to be undertaken unless the enquiry or service request can be resolved at the time it is originally reported.</p> <p>Depending on the nature of the enquiry or service request, the tenant may call back enquiring on progress and may express various emotions or behaviours subject to the response that the CHO provides.</p> |
| 4. Outcome | <p>The outcome of the enquiry or service request is that something should have happened e.g., repair work has been completed, advice has been given, action has been taken to resolve the issue. Again, behaviours and emotions need to be determined relating to the reaction:</p> <ul style="list-style-type: none"> • Has the matter been resolved satisfactorily? • How was the matter resolved? • Are there any aspects outstanding? • What does the tenant feel about how things have been addressed overall? • What could be improved? • Could digital tools make it easier for the tenant to know what is happening? • Can digital tools be used internally to improve responses? |

For each of the above journey stages, behaviours and emotions, pain points and solutions need to be determined:

- 1. Emotions** During the journey, the tenant (or household member) will likely be feeling some sort of emotion (concern, worry, satisfied, annoyed, frustrated, happy, angry, possibly violent etc)
- Subject to the scenario they may feel a combination of these emotions at each stage. A sample emotive state is shown below.

Adding emotions to the journey map can then help to identify where pain points are being experienced. As indicated above, perceptions can come into play here also based on whether we ***think*** we know how they feel or whether we actually do ***know***. This is why it is important to listen to tenants about their experiences on customer journeys for specific scenarios

- 2. Pain Points** If a negative emotion is identified from the above, it is highly likely that a pain point caused it. Pain points can identify where negative emotions are being experienced and why.
- 3. Solutions** Based on the above, it should then be possible to identify or propose changes to the process to improve the experience. This is where digital transformation can be explored – in what way could digital tools assist or support the process?

For each of the above journey stages, there is therefore a combination of activities, emotions, and interactions where problems, pain points and / or improvements ***could*** be identified, i.e., journey characteristics:

| Journey Characteristic | Detail |
|------------------------|--|
| 1. Doing | At each stage of the journey, what is the persona doing; who do they involve or communicate with and how do they do it |
| 2. Thinking | <p>Subject to the action that the persona has undertaken, or what has happened or is happening, this will give rise to how the persona thinks about the situation in terms of:</p> <ul style="list-style-type: none"> a. Possible future action b. How best to respond or communicate a reaction to another persona involved in the situation c. Emotions generated as a result of the action or a response. <p>In any workshop where persona journey mapping is broken down, this could of course be challenging for some to articulate or even be prepared to discuss how they feel in response to certain types of situations. Clearly, such topics would need to be approached with care and compassion in journey discussions.</p> |
| 3. Touchpoints | The doing and the thinking will be due to some degree to a touchpoint as to where and when the tenant and staff personas interact; how they interact and the outcome of the interaction subject to the nature of the situation |
| 4. Issue | Issues or problems may have materialised which compound the problem as well as the person's emotive behaviours such that they need to be addressed |
| 5. Improvement | <p>From the journey, learnings will be drawn and improvements may be identified in response to the issues that have been identified.</p> <p>In response to the issue, in essence this is the point where tension between how things are now and how the persona would like them to be can be identified – what could be done to make things better for the persona in the future?</p> <p>Section 4.3 set out the potential role technology can play as an outcome in journey mapping. In relation to digital transformation, key questions therefore are the extent</p> |

| Journey Characteristic | Detail |
|------------------------|--|
| | <p>to which digital initiatives could better support or improve the situation that is being experienced by the persona.</p> <p>The structure of these questions is very important as they need to be asked in the right way or to put it another way, not to put words in a person's mouth.</p> <div style="border: 1px solid black; padding: 10px;"> <p style="text-align: center;">Case Study</p> <p style="text-align: center;">The Yellow Sony Walkman</p> <p>A classic case of this is the yellow Sony Walkman product market research.⁵</p> <p>To summarise the article reference link below, (which is recommended reading), Sony conducted a face-to-face focus group for a new product, a yellow 'sporty' Walkman instead of the current universally used black design at that time.</p> <p>Reaction from the group to the question of 'how do you like it' was unanimously terrific, with most of the group saying they preferred it over the black one.</p> <p>Sony Marketing provided both types of the Walkman as a gift for participants to choose as a way of thanks for their input on the way out of the session.</p> <p>All of the participants chose the black Walkman.</p> <p>There were 2 reasons for this:</p> <ol style="list-style-type: none"> 1. Nobody wanted to tell the facilitator of the focus group that they actually did not like the yellow Walkman! 2. People were afraid to speak out in a group and voice their true opinions, mistakenly fearful that the majority of participants would prefer the yellow one when they did not. </div> <p>So, based on the above, the persona journey mapping workshop question should not pose the question e.g., 'would you like us to provide a web portal' as most would probably say 'yes.'</p> <p>If the question is posed as to how they see digital transformation being used to solve the problem, the answer would be different. In effect, the improvement characteristic of the journey mapping is also a problem-solving part in testing a hypothesis.</p> |

⁵ <https://uxdesign.cc/to-ask-or-to-observe-e8a183cfda71>

8. Documenting Persona Journeys

Taking the above sections into account, the journey map needs to be structured so discussion with persona can be focused and then effectively documented.

A customer journey map is typically set out in a grid format, which participants would contribute to in a workshop using a whiteboard style approach to the phases of the journey set out above. It is important to bear in mind that a number of actions and emotions are highly likely to be identified in each stage of the journey.

So, based on the above, the matrix used to document the journey in a workshop / whiteboard environment for selected situations across tenancy management services would be as follows:

| Persona Enter Persona Name | Situation [Name] Journey Phases | | | |
|-----------------------------------|---------------------------------|-----------------|----------|---------|
| | Catalyst | Initial Actions | Progress | Outcome |
| Doing | | | | |
| Thinking | | | | |
| Touchpoints | | | | |
| Issues | | | | |
| Improvements | | | | |

The above matrix can be used as the discussion template for both tenant and staff personas to document their respective journeys in relation to each selected situation. These are described in more detail below.

8.1 Tenant Persona Journeys

On the basis of '***as a [persona], I want to [do something] so that I can [derive a benefit]***,' the types of situations that could be covered to assess what the personas experienced across their respective journeys are as follows:

| Journey Type | Ref | Situation Description |
|------------------|-------------|---|
| Introductory | Situation 1 | Wanting to apply for housing |
| | Situation 2 | Enquiring as to the prospects of when offer will be made of a tenancy |
| Onboarding | Situation 3 | Responding to an offer of a tenancy |
| | Situation 4 | Tenancy Sign-up |
| | Situation 5 | Return ingoing condition report |
| | Situation 6 | Disagree with CHO assessment of property condition |
| Service Response | Situation 7 | Make repair request |

| Journey Type | Ref | Situation Description |
|----------------|--------------|--|
| | Situation 8 | Enquire on progress of repair request (Can you tell me when will it be done?) |
| | Situation 9 | Complain that repair not done yet (I've been waiting for x weeks and it's still not done, what is happening?) |
| | Situation 10 | Complain of poor quality of work, request rectification |
| | Situation 11 | Enquire about rent balance (how much do I owe, need to pay this week?) |
| | Situation 12 | Requesting a rent statement |
| | Situation 13 | Advise of payment being made but not shown on statement |
| | Situation 14 | Advise on a change in circumstances |
| | Situation 15 | Responding to rent review letter request to confirm income details |
| | Situation 16 | Responding to a letter about rent arrears |
| | Situation 17 | Disputing the amount of rent arrears |
| | Situation 18 | Wanting to make an arrangement to pay off rent arrears |
| | Situation 19 | Needing to extend the arrangement due to debt issues |
| | Situation 20 | Responding to a request to be at home for an inspection |
| | Situation 21 | Make complaint about neighbour's anti-social behaviour |
| | Situation 22 | Make further complaint that nuisance has not abated after CHO action |
| | Situation 23 | Advise that a relative joint tenant has died and request amendment to the tenancy |
| | Situation 24 | Request permission to add a cohabitee to the tenancy |
| | Situation 25 | Request permission to make an alteration to the property |
| | Situation 26 | Request permission to be absent from the tenancy for a period of time |
| | Situation 27 | Report incident of domestic violence and request assistance |
| Retain / Churn | Situation 28 | Giving notice of intention to vacate a tenancy |
| | Situation 29 | Disputing end of tenancy condition report |
| | Situation 30 | Disputing end of tenancy charges |

| Journey Type | Ref | Situation Description |
|--------------|--------------|--|
| | Situation 31 | Rescinding notice to vacate and wanting to remain as tenant for the property |

In terms of workshopping the persona journeys relating to the above, it is suggested that one situation is chosen for each persona proposed in this document.

Using the matrix above, a workshop session would be held with each persona. The table below sets out questions that could be used based on:

1. The journey from the tenant persona's perspective – the outside-in journey
2. The journey from the staff persona's perspective in responding to the enquiry or service request – the inside-out journey.

Workshops could be held for each of the above personas separately, however, a joint workshop with both tenant and staff personas could potentially reveal interesting outcomes.

The questions for each phase in relation to the categories for each journey phase, split between the tenant's and staff actions for each situation are proposed as follows:

| Situation Stage | Attributes | Outside-in Tenant Journey Questions | Inside-out CHO Journey Questions |
|-----------------|-------------|--|--|
| Catalyst | Doing | <ol style="list-style-type: none"> What do you typically do first? Is there any help provided to you in identifying the problem or which could assist you with the problem or enquiry before you contact your CHO? Do you have access to any supporting information from your CHO that could assist with your problem or enquiry? Is this readily or easily available? | <ol style="list-style-type: none"> Do we provide help or guidance to tenants to make them aware of what to do if they have a problem? If we do, when and how do we do it? |
| Catalyst | Thinking | <ol style="list-style-type: none"> How do you feel when you ask the CHO for information, advice, help or make a service request in relation to this situation? Do you have any fears or reservations about contacting your CHO for help? What are your feelings in this type of situation? | <ol style="list-style-type: none"> What are our perceptions as to what the tenant is feeling at this point? Why is the tenant feeling this way? What do tenants actually think about us and how we do things? What do you feel about the information and guidance that the CHO provides to tenants on what to do if they have a problem? |
| Catalyst | Touchpoints | <ol style="list-style-type: none"> For this situation, what are your touchpoints with the CHO i.e., where the tenant can form an opinion of the CHO's service based on the nature and severity of their situation combined with how staff are responding to the situation? | <ol style="list-style-type: none"> How do we communicate with the tenant? How do we respond to the tenant? What information do we record about this situation at this point? |
| Catalyst | Issues | <ol style="list-style-type: none"> What and where are the biggest pain points for you in this situation? What would make the situation better? | <ol style="list-style-type: none"> What do we think are the tenant's biggest pain points at this stage? Do we know what the tenant's biggest pain points are? |

| Situation Stage | Attributes | Outside-in Tenant Journey Questions | Inside-out CHO Journey Questions |
|-----------------|--------------|---|--|
| | | | <ul style="list-style-type: none"> 3. Have we asked them? 4. How should we think differently as to how we can best respond to and then resolve this situation? |
| Catalyst | Improvements | <ul style="list-style-type: none"> 1. What do you think the CHO should do to improve what they do and how they respond to these types of situations? 2. How do you think technology could be used to make the process better? 3. If you don't have access to technology, what would you like to see happen? 4. Do you use a smartphone? 5. Do you have access to a PC or tablet at home? 6. If you could interact with your CHO online, would you do it? 7. What would you like to do online? 8. What would make it easier for you to do things with your CHO online? | <ul style="list-style-type: none"> 1. What can we improve so that tenants have a better understanding of how to identify and report problems? 2. Can we improve how tenants know what we do and who to approach? 3. How could technology improve this? 4. If tenants do not have the means to access services online, what can we do to support this effectively, so that they can find out what to do in certain situations? |
| Initial Actions | Doing | <ul style="list-style-type: none"> 1. What is your action in this type of situation? 2. What do you do in relaying the detail of the situation to the CHO? How easy is it? 3. What communication channel do you typically use to report the problem? 4. What would make it easier to report problems to the CHO? | <ul style="list-style-type: none"> 1. Do we know what the tenant experienced in initially reporting the situation? 2. What actions do we take in the background? 3. Who do we need to involve in our organisation to resolve the situation and why? 4. What is our procedure for this situation? 5. How are other staff notified of any tasks that need to be undertaken once details of the situation have been received and recorded? |

| Situation Stage | Attributes | Outside-in Tenant Journey Questions | Inside-out CHO Journey Questions |
|-----------------|-------------|---|---|
| | | | <p>6. How do we let the tenant know the situation has been resolved or the enquiry has been answered?</p> |
| Initial Actions | Thinking | <ol style="list-style-type: none"> 1. What were your expectations in undertaking the actions you did? 2. Do you feel you are treated courteously and considerately at this stage? 3. What are your feelings in this type of situation? 4. Did you feel you were engaged? 5. How would you rate your experience on a scale of 1-10 where 1 = appalling and 10 = fantastic | <ol style="list-style-type: none"> 1. What did we think the tenant experienced at this point in the process e.g., in how we respond to the initial enquiry? 2. What are our perceptions as to what the tenant is feeling at this point? 3. Why is the tenant feeling this way? 4. What is going on around the tenant at this step? Are there any extenuating or emotive situations that we need to be aware of? Did we ask? 5. What do think of how your organisation handles service requests and enquiries from tenants? |
| Initial Actions | Touchpoints | <ol style="list-style-type: none"> 1. Describe the touchpoints experience for each stage of the situation i.e. <ul style="list-style-type: none"> a. Reporting it b. Receiving acknowledgement 2. How do expectations (met or unmet) influence the person's emotions? | <ol style="list-style-type: none"> 1. How do we communicate with the tenant? 2. What information do we record about this situation at this point? |
| Initial Actions | Issues | <ol style="list-style-type: none"> 1. What and where are the biggest pain points for you in this situation? 2. What would make the situation better? | <ol style="list-style-type: none"> 1. What do we think are the tenant's biggest pain points at this stage? 2. Do we know what the tenant's biggest pain points are? 3. Have we asked them? 4. How should we think differently as to how we can best respond to and then resolve this situation? 5. What is preventing you from doing your job effectively? 6. What are the problems that really exist and what are important? |

| Situation Stage | Attributes | Outside-in Tenant Journey Questions | Inside-out CHO Journey Questions |
|-----------------|--------------|--|--|
| Initial Actions | Improvements | <ol style="list-style-type: none"> 1. What do you think the CHO should do to improve what they do and how they respond to these types of situations? 2. What improvements should be made to make it easier for you to log enquiries or service requests? 3. In what way do you think technology could make it easier? 4. If you do not have access to internet devices, what could the CHO do to support you more effectively? | <ol style="list-style-type: none"> 1. Can we improve what we do? 2. Can we improve how we respond to the tenant? 3. How can our service / approach / procedure be better utilised or provided at this point? 4. What do we want to change about the way we respond to and resolve the situation? 5. How could we use digital technology to respond to these situations? 6. How and / or why will we make this change? 7. How would we make tenants aware of our new digital service offerings? 8. How might we test whether they actually care about a new digital service offering? 9. How would we support those who do not have the means to access the internet? 10. How often would expect them to use a new digital channel? 11. How do we measure success? |
| Progress | Doing | <ol style="list-style-type: none"> 1. How easy is it to find out what is happening to the progress of your enquiry or service request? 2. What could the CHO do to make the experience better for you? | <ol style="list-style-type: none"> 1. What do we do when a tenant contacts us as to progress of their enquiry or service request? 2. Who do we refer it to internally? 3. How do you go about doing the things you do? 4. What tools and technology do we use in monitoring progress? 5. How do we access information? 6. Who does it? |

| Situation Stage | Attributes | Outside-in Tenant Journey Questions | Inside-out CHO Journey Questions |
|-----------------|-------------|--|---|
| | | | <ul style="list-style-type: none"> 7. Are there phases to the journey for this situation? E.g., planning; internal discussion; decision-making which may impact progress 8. How does each step enable the next? 9. Are there barriers or challenges experienced in moving forward? 10. Is the path forward clear to the tenant? |
| Progress | Thinking | <ul style="list-style-type: none"> 1. Do you feel you are treated courteously and considerately at this stage? 2. What are your feelings in this type of situation? 3. How do you feel if there is an ongoing problem? 4. How do you feel if you think or believe nothing is happening? 5. If you have ever experienced misleading or contradictory communications, what are your feelings? 6. What were your expectations in terms of how you're the CHO would deal with and resolve your problem? 7. How would you rate your experience on a scale of 1-10 where 1 = appalling and 10 = fantastic | <ul style="list-style-type: none"> 1. What did we think the tenant experienced at this point in the process e.g., in how we respond to subsequent communications? 2. What are our perceptions as to what the tenant is feeling at this point? 3. What is going on around the tenant at this step? Are there any extenuating or emotive situations that we need to be aware of? Did we ask? 4. Why is the tenant feeling this way? 5. How would you rate how you provided service on a scale of 1-10 where 1 = appalling and 10 = fantastic |
| Progress | Touchpoints | <ul style="list-style-type: none"> 1. Describe the touchpoints experience for each stage of the situation i.e. <ul style="list-style-type: none"> a. Contacting the CHO asking on progress b. Reporting a re-occurrence of the problem 2. How and why might emotions and attitudes change in different channels or at different stages of a journey? | <ul style="list-style-type: none"> 1. How do we keep the tenant informed as to what is happening with their enquiry or service request? 2. What information do we record about this situation at this point? 3. How many staff and who are involved in administering the progress of the enquiry or service request? 4. To what extent do these touchpoints complicate progress? |

| Situation Stage | Attributes | Outside-in Tenant Journey Questions | Inside-out CHO Journey Questions |
|-----------------|--------------|--|---|
| | | | 5. How does timing impact the tenant at the various touch points e.g., are long hold times making it hard to complete a task? What are the reasons why things stall? Are the right messages being communicated to the tenant at the right time? Are these messages productive? |
| Progress | Issues | 1. What and where are the biggest pain points for you in this situation? | 1. What do we think are the tenant's biggest pain points at this stage? 2. Do we know what the tenant's biggest pain points are? 3. Have we asked them? 4. How should we think differently as to how we can best respond to and then resolve this situation? 5. What problems or opportunities did you identify on this journey? 6. If you could change one thing, what would it be? |
| Progress | Improvements | 1. What do you think the CHO should do to improve what they do in progressing enquiries and keeping you informed on progress? 2. How do you think technology could be used to make the process better? 3. If you don't have access to technology, what do you think the CHO should do to improve how you are kept informed on the progress of your enquiry or service request? | 1. What can we do to improve in progressing an enquiry or service requests? 2. Who needs to be aware of this in the organisation? 3. How can we measure the impact of any changes we make in the progress stage? |
| Outcome | Doing | 1. Do you do anything when the situation has been resolved? | 1. Do we notify the tenant that the enquiry or service request has been resolved? 2. Do we follow-up to ask the tenant for their opinion? |

| Situation Stage | Attributes | Outside-in Tenant Journey Questions | Inside-out CHO Journey Questions |
|-----------------|--------------|--|--|
| | | 2. What if it has not been resolved in your opinion, what do you do? | 3. Do we do anything about it? |
| Outcome | Thinking | 1. What do you feel when the situation has been resolved? 2. How do you feel in relation to how the outcome has been communicated to you? 3. How would you rate your experience in terms of how your enquiry or service request was resolved on a scale of 1-10 where 1 = appalling and 10 = fantastic | 1. What do we <i>think</i> of the process in arriving at the outcome? 2. How would you rate your experience in delivering the outcome to the tenant on a scale of 1-10 where 1 = appalling and 10 = fantastic |
| Outcome | Touchpoints | 1. Describe the touchpoints experience in being told of the outcome | 1. Do we notify the tenant that an enquiry has been resolved? 2. What information do we record about this situation at this point? |
| Outcome | Issues | 1. What and where are the biggest pain points for you at this stage in the situation? | 1. What obstacles did we encounter in arriving at an outcome? 2. Are we satisfied with how we manage the response to this situation? |
| Outcome | Improvements | 1. What would make the situation better? 2. What would make it easier for you to know that your problem or enquiry has been resolved? 3. How do you think technology could be used to make the process better? 4. If you do not have access to technology, what do you think the CHO should do to: a. Improve how they handle your enquiry or service request b. Help and support you to get online | 1. How can digital technology be used to improve outcomes? 2. How can we measure outcomes? 3. How can we measure the impact of any changes (new processes, improved communication, digital technology) |

Using sticky post-it notes or a Miro whiteboard tool in a workshop setting, the journey map could therefore look something like this:

| Situation Name | Situation Journey Phases | | | | |
|----------------|--------------------------|-----------------|----------|---------|---|
| Persona Name | Catalyst | Initial Actions | Progress | Outcome | |
| Doing | 1 | 2 | 3 | 4 | 5 |
| Thinking | 1 | 2 | 3 | 4 | 5 |
| Touchpoints | 1 | 2 | 3 | 4 | 5 |
| Issues | 1 | 2 | 3 | 4 | 5 |
| Improvements | 1 | 2 | 3 | 4 | 5 |

Once the journey has been mapped for each situation, it can then be summarised as illustrated in the **sample table below**.

| Persona | Enter name of persona from Section 2 | | |
|---|---|--|---|
| Situation reference | Expectations | | |
| Tenant has problem / needs to... / wants help or advice | Request / enquiry resolved in a reasonable timeframe Friendly and helpful assistance from CHO staff Good, reliable customer service Clear communications Positive outcome situation | | |
| Journey Phases | | | |
| Catalyst | Initial Action | Progress | Outcome |
| How the customer identifies / discovers the problem or wants assistance or information | Tenant contacts CHO to make service request / enquiry across a range of scenarios. Experience is easy, good, smooth to dreadful List emotions | Wants / expects to be updated on progress of request (good communication keeps tenant informed) List emotions | Request / enquiry satisfactorily resolved Request / enquiry NOT resolved Further issues identified or develop |
| Feelings, Mindsets and Emotions | | | |
| Customer Experience Level | | | |
| 10 | | | |
| 9 | | | |
| 8 | <i>I need my provider to help me with... I contacted them by</i> | | |
| 7 | | <i>Well, they handled that reasonably well</i> | |
| 6 | | | |
| 5 | | <i>Why is this so difficult? Why is taking so long?</i> | |
| 4 | | | |
| 3 | | | |
| 2 | | | |
| 1 | | | |
| 0 | | | |
| Cause | Initial Action | Progress | Outcome |
| Outcomes and Learnings | | | |
| Issues (Level of Service / Pain Points) | Improvements (Internal Ownership / Actions) | | |
| Example: <i>Frustrating lack of communication on keeping me updated on what is happening.</i> <i>Needed to keep calling to ask on progress.</i> <i>Kept getting referred to a different person every time</i> | Example: <i>With use of a portal combined with a digital workflow engine integrated to the back-office system, our tenants could see the progress of their service request on line</i> | | |

8.2 Staff Persona Internal Operational Journeys

On the basis of '*as a [staff persona], I need to [do something, complete a task] so that I can [progress/complete / resolve something]*,' the types of situations that could be covered to assess what the personas experienced across their respective journeys are as follows:

| Situation | Situation Description |
|--------------|---|
| Situation 1 | Undertake tenancy inspection, check condition of property and record outcome |
| Situation 2 | Processing tenant damage costs |
| Situation 3 | Raise work order and issue to contractor |
| Situation 4 | Receive invoice from contractor, check work and authorise payment |
| Situation 5 | Managing contractors and renewing certification |
| Situation 6 | Maintaining asset data upon completion of maintenance work (new asset installed with warranty) |
| Situation 7 | Setting up and managing cyclical maintenance programmes (how do we know what needs to be done and when) |
| Situation 8 | Processing water charges from water company and re-charging tenants for usage |
| Situation 9 | Creating a tenancy, ensuring all required steps are completed |
| Situation 10 | Authorising and processing a write-off |
| Situation 11 | Paying suppliers (other than maintenance contractors) |
| Situation 12 | Calculating rent changes |

The above is of course not exhaustive and other situations may be identified.

As discussed in section 4.2, it is important to distinguish between journey and process mapping. Process maps describe what needs to be done by those performing the process, while journey maps are built around those **experiencing** the journey and the end result of a process.

Neither should the above situations be used to undertake a business requirements gathering or a gap analysis of current information systems. In terms of improvements for internal operations, it is perhaps inevitable that operational staff persona may wish to identify system improvements to **current transactional systems**, however, **the focus should be on identifying where and how digital technology could be used in general terms** e.g., automation of documents; contractor / supplier portals, use of mobile; customer portals; chatbots etc.

The questions for each phase in relation to the categories for each journey phase are proposed as follows.

| Situation Stage | Attributes | Operational Persona Questions |
|-----------------|-------------|--|
| Catalyst | Doing | <ol style="list-style-type: none"> How is the situation initiated? How do you know you need to do something about the situation? |
| Catalyst | Thinking | <ol style="list-style-type: none"> How are you notified of what you being asked to do in this situation? What do you feel when are first notified? |
| Catalyst | Touchpoints | <ol style="list-style-type: none"> What are the internal touchpoints? |

| Situation Stage | Attributes | Operational Persona Questions |
|------------------------|---------------------|--|
| Catalyst | Issues | 1. What is the biggest problem for you as to how you are notified of needing to do the tasks you need to do? |
| Catalyst | Improvements | 1. What could make this situation better for you? |
| Initial Actions | Doing | 1. Upon receipt of being notified of the task, what do you do? 2. What tools do you use to perform the task? 3. How many tasks did you resolve last week? 4. What are the hardest parts of doing what you do at this point |
| Initial Actions | Thinking | 1. What are you thinking at this point? 2. How do you feel? |
| Initial Actions | Touchpoints | 1. Who do you involve if the situation requires it to progress the task? |
| Initial Actions | Issues | 1. What problems or obstacles do you encounter in undertaking the initial actions? |
| Initial Actions | Improvements | 1. What would you change about how you undertake these actions |
| Progress | Doing | 1. What do you do in progressing the task? 2. What do you use to monitor progress of the task (if you are responsible for it)? 3. What is your typical workload? 4. Does your workload have an adverse impact on progressing tasks? 5. What are the hardest parts in progressing a task? |
| Progress | Thinking | 1. What are your emotions in progressing tasks? 2. Do you find monitoring tasks and progressing them is easy or difficult? 3. What is your experience? |
| Progress | Touchpoints | 1. Who do you involve in needing to progress and when? 2. How do you communicate with any staff involved in progressing the task? |
| Progress | Issues | 1. What issues do you encounter in progressing the task? |
| Progress | Improvements | 1. What would make it better or easier for you? 2. What would you change if you could? |
| Outcome | Doing | 1. What motivates you in doing this role? 2. What do you do in completing the task? |
| Outcome | Thinking | 1. What are your thoughts on what it took to complete the task? 2. How do you feel when the task is completed? |
| Outcome | Touchpoints | 1. Who do you interact with internally in resolving the task or the problem? |
| Outcome | Issues | 1. What problems or obstacles do you encounter in resolving the task or problem? |

| Situation Stage | Attributes | Operational Persona Questions |
|-----------------|--------------|--|
| Outcome | Improvements | <ol style="list-style-type: none">1. What would you like to improve in terms of how you can resolve or complete the task?2. What could be done to make the experience better?3. How could digital technology be used to improve your experience? |

Experiences would be summarised in the same manner as for the tenant persona journeys.

9. Toolkit

Templates for the persona journey mapping suggested in this document are provided in ***06 Persona Journey Mapping Toolkit.xlsx***:

Appendix 1 – CHO Persona Mapping Workshops

CHO 1 – Staff Journey: Temporary Accommodation

CHO 1 Regional NSW Tier 1 Provider

Temporary Accommodation: Staff Journey

Workshop Date: 6 December 2022

| Persona | | | |
|--|--|---|--|
| <ul style="list-style-type: none"> Senior Housing Manager | | | |
| Expectation | | | |
| <ul style="list-style-type: none"> Forge positive relationships with clients Help staff make the right decisions Prioritise applications for temporary housing objectively Commitment to delivering better services Approach is dependent on guidelines set by NSW Department of Communities & Justice (DCJ) | | | |
| Doing & Actions Taken | | | |
| <p>Clients in need of emergency or temporary accommodation typically approach the community housing organisation (CHO) through one or more of the following channels:</p> <ul style="list-style-type: none"> Referrals from other agencies / support services Local knowledge Word of mouth Domestic violence hotline Office visit Google search CHO web site | <p>Information on the client's circumstances is recorded in the HOMES system. Consents are signed and the client's eligibility for temporary accommodation is assessed.</p> <p>Some clients need specific help or support and it is important to personalise this as much as possible due to their circumstances.</p> <p>Client Relationship Officer (CRO) searches for temporary accommodation using another system CIMS.</p> | <p>A spreadsheet is used to keep track of placements in temporary accommodation. Notes are also entered in HOMES and CIMS. There are therefore 3 separate data sources resulting in manual data duplication.</p> <p>The spreadsheet is used to maintain statistics and reporting on placements and housing outcomes, such as clients being housed in private or community housing.</p> <p>Clients are connected to or assigned to specific types of support service as identified. CHO staff do not provide any further assistance until the relevant support service has met with the client. Based on</p> | <p>The CRO prepare priority submissions for permanent housing, once efforts to secure private rental accommodation have been exhausted. This includes all details of the client's situation, progress made, efforts made to find housing, medical issues and special needs. Clients are advised to make attempts to resolve homelessness themselves.</p> <p>Once a priority submission has been prepared, the Allocation officer will advise the client when an offer of permanent CHO accommodation is to be made when suitable housing becomes available, which then requires more forms to be signed.</p> |

| Doing & Actions Taken | | | |
|---|--|--|---|
| Catalyst | Initial Action | Progress | Outcome |
| The CHO front desk acts as a triage, asking a range of questions on the person's situation and will seek evidence why the client cannot continue living in their current accommodation. An interview form is used to capture information on the client's circumstances and staff encourage clients to talk openly on their situation and its cause. | <p>Touchpoints in undertaking initial actions are with:</p> <ol style="list-style-type: none"> 1. The client in maintaining contact, advising on progress 2. Liaising with motels 3. Liaising with support services 4. Internal discussions with the CHO | <p>this CHO staff liaise with the agency as to their respective involvement. Reminders are provided as to when CHO staff should re-engage with the client.</p> <p>Clients are allowed to miss appointments with a good reason.</p> | <p>HOMES Is used to generate the offer and the client is then removed from the register i.e., the application status is updated.</p> <p>A set process must be following within a specific timeframe.</p> |
| Thinking, Feelings, Mindsets and Emotions | | | |
| Catalyst | Initial Action | Progress | Outcome |
| Sometimes it can be difficult or painful to listen due to the client's circumstances in being homeless. Stories can be quite emotional and trigger emotions in staff in having to respond and it is often difficult listening to individual situations due to what some people have been through. Being in need of temporary accommodation can be incredibly hard. Feelings of helplessness exist in certain situations if nothing is available. Other feelings include anger, resentment and / or frustration due to lack of resources or available housing. Staff also have to cope with the client's shame as well as prejudicial community views on people who are homeless. So, it is hard for staff to deal with and emotionally draining at times. | <p>Situation becomes even more frustrating if staff are unable to help, however, this is part of the job.</p> <p>Frustrations also surface with the barriers which must be overcome in finding accommodation.</p> <p>A common challenge is finding temporary accommodation facilities which accept pets.</p> <p>Feelings consistent with the catalyst stage are also prevalent in processing applications as the initial action.</p> | <p>The progress phase is fraught with feelings of difficulty, stress and a constant sense of jumping over hurdles in trying to help clients in need.</p> | <p>The persona felt that the job can be rewarding, and experiences feelings of elation when a client is allocated permanent accommodation but it can also be heart-breaking for staff where this is not possible.</p> <p>When a good outcome is achieved, it feels really good however conversely bad situations can be really bad and staff feel that way too.</p> <p>It is not surprising that there is much burn-out amongst staff.</p> <p>The persona felt that the whole process in reaching an outcome is somewhat demeaning.</p> <p>In terms of scoring, this can vary wildly from 1 to 10.</p> <ul style="list-style-type: none"> • Overall, using the tools available, the journey score is 5 out of 10 |

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05 Persona Journey Mapping

Thinking, Feelings, Mindsets and Emotions

| Catalyst | Initial Action | Progress | Outcome |
|--|----------------|----------|---|
| <p>First consideration is always to help the client balanced against the uncertainty of whether sufficient accommodation exists.</p> <p>Frustrations are also compounded by government policy over the years and lack of affordable housing.</p> <p>Believes clients would score the CHO in the region of 5 – 8 out of 10, subject to the outcome of their application</p> | | | <ul style="list-style-type: none"> • Experience due to following the Government process is scored at 3 out of 10 and that is being generous. |

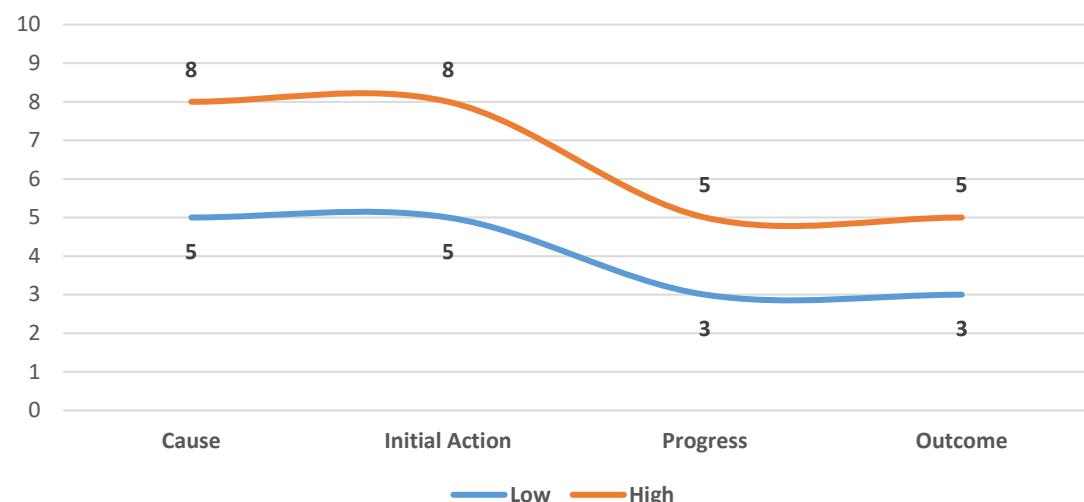
Experience / Feelings Summary

The emotional scoring is very much dependent on the reactions to the severity of the client's situation and the available solutions.

Overall, the journey was rated as being 5 out of 10 using all available means and tools in finding temporary accommodation for clients.

The whole process is both challenging and frustrating, often dealing with clients in stressful situations which accordingly affects the staff personas in terms of how they can respond within the limits they must work and the feelings that these generate.

**Temporary Accommodation Journey
Staff Experience**



| Outcomes and Learnings | |
|--|---|
| Issues (Levels of Service / Pain Points) | Improvements (Internal Ownership / Actions) |
| <ol style="list-style-type: none"> 1. There are many pain points and many hoops to jump through in trying to ensure clients feel safe. The current procedural system adds to the stress and feelings of helplessness amongst staff, compounded by client feelings of fear and confusion on occasions. 2. Reliance on paperwork is an issue however, CHO staff are constrained by DCJ guidelines in what they can do. 3. It is often hard to rely on motels willing to provide temporary accommodation due to the condition by which clients sometimes leave it. Finding and searching for motel availability is therefore fraught with challenges. 4. Having to ask for and rely on paperwork is seen as a big issue. 5. Records are manually checked and updated as reminders for staff as to when to engage with clients. No automatic reminders are generated and workflow software is not used. The onus is on the staff member to look at the notes to advise client what is needed or what needs to be done. This also impacts communication within the team. 6. No system interfaces are in place which therefore results in data duplication, manual data entry and having to remember when to check records. This therefore poses time related issues which in turn can affect efficiency. 7. Internal structure is currently silo driven. 8. There is no cohesion amongst agencies and the level of collaboration varies. Lack of a common information system is key factor in this where agencies could potentially share information. 9. The persona felt that the service, based on the processes it must follow, was set up to fail and that DCJ policies and procedures are at odds with community housing principles. | <ol style="list-style-type: none"> 1. A support service is ideally needed to guide clients through the temporary accommodation process. 2. The ultimate solution is to have more purpose-built accommodation to offer clients in these types of situations. 3. The idea of having a web-based service with all agencies having access to update when accommodation is available was discounted, due to the requirement to use HOMES as per DCJ requirements and procedures. 4. Likewise, digital apps were not seen as being viable due to the need to use HOMES. 5. Better inter-agency collaboration on client placements and their respective health needs was seen as a much-needed improvement. This therefore implies that a common web-based placement app with access provided across agencies could potentially result in operational benefits, however, this would not alleviate the need to also enter information in HOMES due to DCJ requirements. |

CHO 1 - Applicant Journey: Temporary Accommodation

Regional NSW Tier 1 Provider

Temporary Accommodation: Applicant Journey

Workshop Date: 7 December 2022

| Persona | | | |
|---|--|---|---|
| <ul style="list-style-type: none"> Single parent with 2 sons living away from home at university Previously in private rental but living with friends at time of applying for temporary accommodation assistance. | | | |
| Expectation | | | |
| <ul style="list-style-type: none"> Sceptical she could receive immediate help from CHO due to previous experience in private rental accommodation | | | |
| Doing & Actions Taken | | | |
| Catalyst | Initial Action | Progress | Outcome |
| Heard about CHO through word of mouth from people she knew. Based on this, decided to look CHO up using the Internet, searching for emergency assistance. She noted that she could contact an out-of-office number or could come into the office. | Initially contacted CHO by phone and made an appointment. Staff member was very friendly, who clearly explained the documents she needed to bring with her to the appointment set up in order that she could apply for emergency housing. On attending the office, she only had a 10-minute wait before she met with the CHO staff member | Has spent the past 6 weeks in a motel with no set timeline as to how long she would have to stay there. The CHO put her in touch with a support worker at women's shelter. In the past 6 weeks before this journey mapping session, she has been contacted once, either by the CHO or the support worker at the women's shelter. The CHO emailed her to advise when her eligibility for permanent housing had been approved. | At the time of the journey mapping workshop, her application had not been fully resolved however, the CHO had advised in the staff workshop that it was likely she would soon be offered permanent accommodation. |
| Thinking, Feelings, Mindsets and Emotions | | | |
| Catalyst | Initial Action | Progress | Outcome |
| She felt nervous about contacting the CHO and was uncertain as to how they could help her. Furthermore, she had | On attending the interview, she still felt she would not get immediate help and remained uncertain. | She has felt safe whilst staying at the motel, although, perhaps not surprisingly, she has felt | Felt relieved, happy and surprised at the outcome of being granted temporary accommodation with the strong possibility that |

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05 Persona Journey Mapping

Thinking, Feelings, Mindsets and Emotions

| Catalyst | Initial Action | Progress | Outcome |
|---|--|---|--|
| <p>a dog and felt this would count against her, based on her experience in private rental accommodation.</p> <p>She felt anxious about what potentially lay ahead, taking into account her previous experience of not being able to afford to continue living in private rental accommodation.</p> <p>On calling the office, CHO staff member was very friendly and helpful.</p> <p>Scored experience 8 out of 10</p> | <p>At the appointment, she immediately felt very comfortable due to the action and empathetic behaviour of the CHO staff member, who made clear what they could do to help her and what was required of her in terms of the information that she needed to supply.</p> <p>Felt very relieved when CHO advised they could arrange temporary accommodation and based on this, scored the experience as being 8 out of 10</p> | <p>depressed during her time there due to the uncertainty and missing her personal belongings. Due to the long waiting list for housing with the CHO, this also contributed to her depression and uncertainty as well as not knowing what to expect.</p> <p>She felt grateful for what the CHO had done to help her, but due to the uncertainty as to how long she would remain at the motel, she therefore scored the experience at this point as 7 out of 10.</p> | <p>the CHO would be able to offer her permanent accommodation at the time of the mapping workshop. Furthermore, she was also happy in the knowledge that she could keep her dog. The whole process has been faster than she anticipated.</p> <p>The calibre of CHO staff was vital to her experience on this journey and she was aware that she could call the CHO at any time and discuss her situation.</p> <p>Scored her experience as 9 out of 10.</p> |

Temporary Accommodation Applicant Journey



Outcomes and Learnings

Issues (Levels of Service / Pain Points)

Improvements (Internal Ownership / Actions)

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- | | |
|--|---|
| <ol style="list-style-type: none">1. Initially she was unaware that she would need a document confirming that she could not remain where she was currently staying, therefore it would have been helpful to have known this from the outset.2. She had no form of independent transport so getting to the temporary accommodation was difficult.3. Not knowing the status and progress of her application caused depressed feelings. See improvements regarding use of an app.4. One issue was that she did not know the location of the property she was being offered. See improvements regarding use of an app.5. Relied on phone communication with the CHO.6. Persona stated it as hard to find any major fault with the service the CHO provided. | <ol style="list-style-type: none">1. Make clear all of the documents that would be needed for the CHO to process her application2. Provide financial information on the amount she would have to pay3. She uses a smartphone and apps for news and banking. If the CHO provided an app to track the progress of her application, this would have been very useful, as this would have enabled her to know the status of her application and give her surety that it was being dealt with. She knows that most people, even those who are homeless, have access to mobiles or smartphones so an app would be very useful. Aside from this, the best way of communication was by phone. |
|--|---|

CHO 1 - Tenant Journey: Repair Request

CHO 1 Regional NSW Tier 1 Provider

Repair Request Journey

Workshop Date: 8 December 2022

| Persona | | | |
|--|---|--|--|
| <ul style="list-style-type: none"> Male, unemployed, aged 59 with a disability and in receipt of a disability pension | | | |
| Expectations | | | |
| <ul style="list-style-type: none"> Request processed in a reasonable timeframe Friendly and helpful assistance from CHO staff Good, reliable customer service Clear communication on receiving request and knowing when the contractor will attend his home to attend to the problem and complete the work Positive outcome with work completed to his satisfaction | | | |
| Doing & Actions | | | |
| Catalyst | Initial Action | Progress | Outcome |
| Typically phones the office to report a repair problem. Does not use the tenant handbook and has no problems or difficulties in explaining the cause of the problem. At this point, the persona is relaxed, due to the high level of customer service being provided | Tenant contacts CHO to make repair request typically by phone but sometimes calls in at the office. CHO front-desk staff are always kind and courteous as are the housing staff when he phones to report the repair. Process is all verbal and a written acknowledgement is not provided. All he wants is the problem to be fixed. Unsure as to who he reports the problem to. Process is very smooth 9 times out of 10 and as a result, his emotions are calm knowing that the CHO has more often than not dealt with his problem promptly. | Wants / expects to be updated on progress of request (good communication keeps tenant informed). Has always been treated courteously and as long as he is told what is happening with his request, he is happy. When this does not occur, he can become frustrated and irritated. Good communication is therefore essential, however, when occasional problems or delays have arisen, the CHO staff are great in resolving problems. Scored 8 out of 10 | Repair requests made are satisfactorily processed in the vast majority of circumstances with the standard of work from the contractor being of an acceptable to high standard. To date, he has had no experience of any poor quality in workmanship. No contact is made by the CHO when the job is done, neither is a satisfaction survey provided, in contrast with his experience with other retailers. |

| Doing & Actions | | | | | | | | | | | |
|---|---|---|--|-------|----------------|----------|---------|---|---|---|--|
| Catalyst | Initial Action | Progress | Outcome | | | | | | | | |
| | Scored 8 out of 10 | | | | | | | | | | |
| Feelings, Mindsets and Emotions | | | | | | | | | | | |
| <p>On the whole, this persona has experienced good customer service in relation to most of his repair requests.</p> <p>If things go wrong e.g., a delay in the work being done, he will call the office to find out what is happening, which can be somewhat frustrating and irritating for him, hence why he scored his journey experience as being 8 out of 10.</p> <p>Typically, when the work is completed, he feels relieved, due to his disability.</p> | | <p>Repair Request Journey Tenant Experience</p> <table border="1"> <thead> <tr> <th>Cause</th> <th>Initial Action</th> <th>Progress</th> <th>Outcome</th> </tr> </thead> <tbody> <tr> <td>Contacts CHO by phone. Treated courteously</td> <td>Always verbal process. No issues with how CHO responds</td> <td>Expects to be kept informed. CHO staff great in sorting problems</td> <td>Level of service on the whole is very good</td> </tr> </tbody> </table> | | Cause | Initial Action | Progress | Outcome | Contacts CHO by phone. Treated courteously | Always verbal process. No issues with how CHO responds | Expects to be kept informed. CHO staff great in sorting problems | Level of service on the whole is very good |
| Cause | Initial Action | Progress | Outcome | | | | | | | | |
| Contacts CHO by phone. Treated courteously | Always verbal process. No issues with how CHO responds | Expects to be kept informed. CHO staff great in sorting problems | Level of service on the whole is very good | | | | | | | | |
| Outcomes and Learnings | | | | | | | | | | | |
| Issues (Level of Service / Pain Points) | | Improvements (Internal Ownership / Actions) | | | | | | | | | |
| <ol style="list-style-type: none"> Occasional issues arise with lack of communication from CHO keeping him updated on what is happening with specific repair request, however this is very much a rarity rather than the norm. Due to his disability, it is important to know when the job will be done. | | <ol style="list-style-type: none"> Has not really considered where improvements could be made, as the level of service has been very good in the vast majority of instances Uses a basic mobile phone (NB not a smartphone) and has a laptop at home. In view of a basic mobile phone being used, it would be useful to receive SMS messages knowing when the repair request had been processed and when | | | | | | | | | |

| Outcomes and Learnings | |
|---|--|
| Issues (Level of Service / Pain Points) | Improvements (Internal Ownership / Actions) |
| 3. On rare occasions, persona needed to keep calling to ask on progress but, on the whole, it is rare for him to do this as the CHO staff are good at keeping him informed. | 3. The benefit of the portal was acknowledged as he would then be able to see the progress of the repair request, and if a future problem materialised, the persona could see the benefit of knowing when he reported the request and could also be aware of where and when his request would be dealt with. |

CHO 1 - Staff Journey: Repair Request

CHO 1 Regional NSW Tier 1 Provider

Repair Request: Staff Journey

Workshop Date: 9 December 2022

| Persona | | | |
|---|---|---|---|
| <ul style="list-style-type: none"> Tenancy Team Leader 5-6 weeks in role, previously a Client Relations Officer since November 2020 Very different type of role than previous position Has found role to be a rewarding experience so far Stated Tenancy staff are the 'meat in the sandwich' when dealing with repairs due to the interaction with tenants, assets staff and sometimes with contractors | | | |
| Expectations | | | |
| <ul style="list-style-type: none"> Be able to provide a good service Be able to respond to repair requests and process them Respond to enquiries on progress and keep tenants informed | | | |
| Doing & Actions | | | |
| Catalyst | Initial Action | Progress | Outcome |
| A handbook is provided to every new tenant at sign-up. This sets out how to report repairs and provides 3 telephone numbers for tenants to call when reporting maintenance requests. A fridge magnet is also provided. | Requests are emailed to the assets team using the email template and a note is entered into the EMS Basix tenancy and property management system supplied by EMS (it appears this system has limited functionality in how it can support the receipt and conversion of a repair request into a work order). Accuracy varies in terms of what is recorded and problems are not always communicated to the assets team correctly. | A note is entered in Basix to indicate that a work order has been issued. There seems to be no functionality to support work order processing or work order status to indicate this hence why notes are used, which in turn must have adverse implications on reporting. The persona was unsure if timeframes and priorities for completing repairs are communicated to tenants. If there is a delay, tenants will contact staff to follow up and ask on progress. | The contractor contacts the tenant directly to advise when a tradesperson will visit to carry out the work. The CRO is not made aware of this however, some tenants will call the CRO to confirm that they have spoken to the contractor. The CRO follows up with the tenant to check if the work has been done. If there is an issue with the repair, the CRO bears the brunt of the tenant's frustration. |

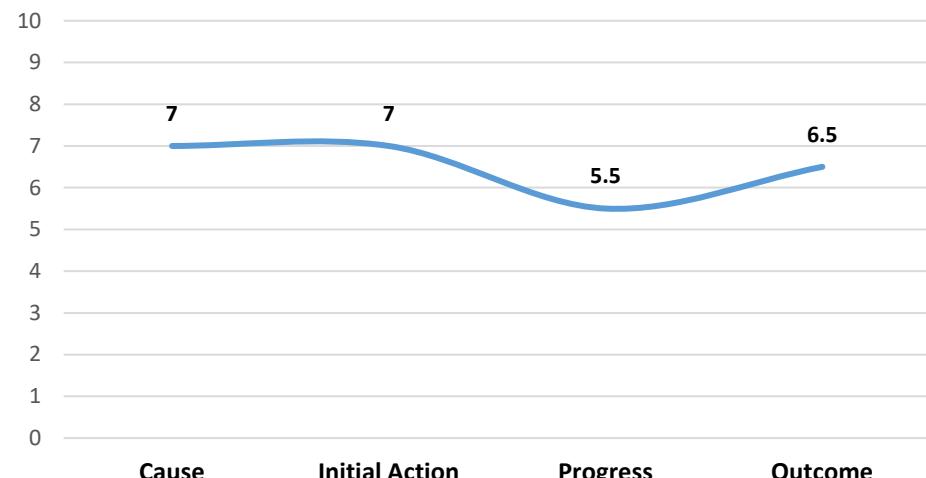
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| Doing & Actions | | | |
|--|--|--|--|
| Catalyst | Initial Action | Progress | Outcome |
| Resident Engagement Officers (REO) contact tenants through email or by phone. | In recent weeks, the responsive repairs team have been entering notes in Basix, which implies that system use has not been consistent and has implications as to other staff not being aware of job progress. | <p>Client relations offices (CRO) are the first point of contact if any issues arise. The CRO will then phone the assets team to get an update on the status of the repair. This would therefore imply a further limitation in Basix since no information seems to be recorded as to the reasons for delays in progressing or completing the work.</p> <p>In 90% of cases, repair requests are processed without any issues or delays occurring. It is of course the other 10% that incur the most time and effort and resolving</p> | <p>The CHO has a complaints department which deals with issues raised by tenants. Tenants may log complaints using the CHO's web site or complete a form in the office. The website requests tenants to enter their email address and a radio button is provided to indicate if the type of feedback being reported relates to a complaint or compliment.</p> <p>When a complaint is made of poor service in relation to repairs, an email is sent to the CRO advising of the complaint and information is logged in Basix. The CRO receives an email from the complaints department once the complaint has been closed.</p> |
| Feelings, Mindsets and Emotions | | | |
| Catalyst | Initial Action | Progress | Outcome |
| <p>Feeling upon receipt of the repair request is let's fix it.'</p> <p>Tenant feelings can vary subject to how bad or urgent the repair is.</p> <p>Sometimes tenants can take out their frustrations on staff, but staff always try to think about how the tenant must be feeling when reporting a repair e.g., problem could be causing anxiety, stress, worry, annoyance etc</p> | <p>At this point, client relations staff still feel like they are in control of the situation in most cases. Typically, there are no heightened emotions at this point, and staff do not tend to panic. In turn, the tenant is typically feeling that something is being done at this point.</p> <p>This part of the journey was therefore scored 7 out of 10.</p> | <p>At this point, if delays occur in processing the request; progressing a work order or in the contractor attending to carry out the work, tenants can naturally have heightened emotions, which, in turn can lead to increased stress for staff. Sometimes, tenants can become angry if a lengthy delay materialises.</p> <p>This part of the journey was therefore scored 5-6 out of 10.</p> | <p>The CRO has to deal with a range of tenant emotions subject to the time taken in progressing the repair request and the quality of work. Tenant frustrations in cases of delays or poor quality work can lead to anger and abusive behaviour which, in turn, can lead to staff feeling stressed and upset.</p> <p>On the basis of a repair request progressing without issues, this was scored 8 – 9 out of 10 on the whole.</p> <p>Where there are cases of poor outcomes this was scored as 4 - 5 out of 10.</p> |

Experience / Feelings Summary

- The persona provided scores in some cases subject to whether there was good or bad progress or a good or a bad outcome. Scores have therefore been averaged overall.
- If the repair request journey progresses without incident or issues, then it is logical from an emotional perspective that the persona would feel happier about that.
- Where issues do arise resulting in abusive or aggressive behaviour by the tenant in term of their feelings in their response to a situation, it is natural for a staff persona to feel unhappy, stressed, anxious or possibly afraid in certain situations.

Repair Request Staff Journey



Outcomes and Learnings

| Issues (Level of Service / Pain Points) | Improvements (Internal Ownership / Actions) |
|--|--|
| <ol style="list-style-type: none"> Most tenants report repairs by phone, with some coming into the office and report the repair to the front counter staff. Few tenants use email however, most tenants have access to smartphones. The repair request is communicated to the responsive repair team through use of email. The Basix system is not used to process the repair request. Lines of communication can therefore become blurred with cracks appearing with requests getting lost or missed on occasions resulting in delays in responding. Furthermore, there is often a lack of communication internally as to the progress of a repair and its current status due to the system functionality limitations. The current structure in view of the numbers of staff involved from different teams or departments is resulting in 'too many cooks in the kitchen.' | <ol style="list-style-type: none"> Use of email to refer the repair request to the responsive repairs team leaves open the possibility that requests could and do get lost with manual work then needed to process and check on progress. Basix appears to provide no or limited functionality to log repair requests and to link these to a work order arising from the request. If this functionality is provided, it is not being used, with reliance instead on using email. Ideally, any system should be capable of allowing the user to log details of the repair request and through workflow or notification functionality, generate a task such that the responsive repair team may assess the work being requested, inspect it or immediately raise a work order and issue it to a contractor. The status of the work request and order should be visible to all staff involved in dealing with repairs. The Basix system provides no workflow capability so scope to establish any form of automation is very limited. With the belief that most tenants use smartphones, an app to advise tenants of the current status of their work request would be extremely beneficial and would help to address the |

| Outcomes and Learnings | |
|--|---|
| Issues (Level of Service / Pain Points) | Improvements (Internal Ownership / Actions) |
| <p>6. Tenants rely heavily on the CRO for updates on progress of their repair request and tenants can become frustrated when they have not had any contact as to what is happening with their request.</p> <p>7. The Basix system does not indicate who issued the work order nor the contractor to which the order has been sent to.</p> <p>8. Notes are not always updated and in turn, exacerbates data accuracy issues which therefore pose adverse implications as to how and when staff advise tenants on progress of their repair request.</p> <p>9. Reliance on use of notes also leads to inconsistencies in what is being recorded with no structure, and also means that reporting on the current status of work requests and orders is unreliable.</p> <p>10. The CHO issues work to a wide range of contractors across the region it covers. Most of these are small operators. Basix does not provide a contractor portal and the persona doubted whether contractors would or could use this functionality even if it was available.</p> <p>11. The work order is not marked as completed (closed off) until the invoice is paid, which results in some issues arising with staff (who know how to use Basix) not knowing whether the work has been finished. Basix appears not to provide fields to record both the physical completion date and the financial completion date. Only one field is provided to record completion and this is used when payment has been made.</p> <p>12. Communication preferences are recorded at the sign-up stage and logged in Basix.</p> <p>13. Basix was viewed as being a clunky system to use.</p> <p>14. The potential benefits for tenants using an app to log requests and being able to track progress of each request was acknowledged and understood.</p> | <p>communication issues currently being experienced. In turn, this would also require improvements to the Basix system if this is possible. EMS do not currently provide an app. If the CHO continues to use Basix, consideration would therefore need to be given as to how such an app could be procured and then how it would be integrated.</p> <p>5. The CHO needs to work on improving communication lines between who is issuing work orders and the client relations officer. Again, this could be addressed with improvements in the main tenancy management system, if this is possible as well as introducing greater collaboration across teams.</p> <p>6. Basix clearly has functionality limitations on how it can support the repair request through its journey to being completed. This could be due to how the system has been configured or it could be due to functionality weaknesses.</p> <p>7. Use of a work order status which is automatically updated as the request progresses would enable staff to know the current position and be able to better advise tenants when needed or when tenants make enquiries. In addition, use of task-driven workflow functionality would enable staff to know when related tasks need to be done and to clearly see when these have been completed. Basix does not provide this, therefore the CHO's ability to introduce automation into the process would appear to be limited.</p> <p>8. Being able to better communicate more quickly with the tenant was viewed as an improvement as it was acknowledged that some tenants feel as if they are in the dark on the progress of their repair request. The introduction of an app providing facilities to track the progress of a repair request was therefore seen as a potentially beneficial improvement.</p> |

CHO 2 - Tenant Journey: Repair Request

CHO 2 Metropolitan NSW Tier 1 Provider

Repair Request Journey

Tenant Persona Workshop

6 February 2022

Persona Overview

The session was attended by 16 tenants who have been tenants of the CHO for varying durations ranging from 6 – 15 years.

Of the 16:

- 1 was a wheelchair user
- 3 were not born in Australia and of these, 1 required an interpreter to translate the discussion throughout the workshop
- 7 were over the age of 55
- The vast majority of attendees have use of smartphones and were accustomed to using them for a variety of purposes, some using them to undertake online transactions for other types of services
- A small number of attendees were fearful or apprehensive about using new technology and are reluctant to do so.

Summary of Expectations

1. Request processed and resolved in a reasonable timeframe
2. Have confidence that the request will be processed
3. Be told what the priority for the work is and what that means
4. Being kept informed on progress, especially if there will be a delay
5. Know when the job will be done
6. Friendly and helpful assistance from CHO staff
7. Good, reliable customer service
8. Know when the contractor will visit the person's home to do the work
9. Positive outcome with the problem being satisfactorily resolved with work completed to a good standard using good materials

| Doing & Actions Taken | | | |
|---|---|--|--|
| Catalyst (Problem Identification) | Initial Action | Progress | Outcome |
| <p>1. Most tenants were aware of what to do when identifying and reporting a repair.</p> <p>2. Some were aware that the CHO provided information on what to do in its handbook; in the sign-up pack or on its web site.</p> <p>3. There is minimal diagnostic information in terms of how to accurately describe the repair or nature of the issue, which can pose some challenges for some people from time to time.</p> <p>4. A small number of tenants access the CHO's website on a regular basis.</p> <p>5. The vast majority did not know what comprises an urgent and a non-urgent repair. This is unclear from the information available to tenants.</p> <p>6. There were varying degrees of uncertainty as to which number to call, either front desk reception or the asset repairs dedicated phone line.</p> <p>7. Some tenants knew what to do whereas others were unclear.</p> <p>8. The vast majority stated they need or would benefit from greater clarity on:</p> <ul style="list-style-type: none"> a. Diagnosing a repair | <p>1. Half of the tenants typically contact the CHO by phone to report a repair.</p> <p>2. Many find the process relatively easy.</p> <p>3. One tenant always reports repairs by email in order to ensure he has an audit trail in case anything goes wrong, therefore proving when the repair was reported and when an acknowledgement was received.</p> <p>4. Some use the repair request form on the CHO's web site.</p> <p>5. A small number occasionally call at the office to make the repair request.</p> <p>6. Forms are provided in other languages and language translation services are provided by the CHO.</p> | <p>1. Invariably tenants simply wait for a contractor to arrive at their home to carry out the repair.</p> <p>2. Some reported that they receive an SMS from the contractor to confirm suitability of an appointment which they found useful.</p> <p>3. Approximately 30% of attendees regularly need to call the CHO to follow up on progress of the repair.</p> <p>4. Some reported that they do not know when the repair will be done and will either wait until a contractor arrives or will eventually call the CHO to ask when the repair will be carried out.</p> | <p>1. If the quality of the work does not meet expectations, the tenant reports this to the CHO. This can be due to a range of scenarios such as:</p> <ul style="list-style-type: none"> a. Quality of materials used is poor b. A belief that some contractors use unqualified tradespeople or apprentices c. Poor quality workmanship <p>2. Some tenants reported that the quality of work is good but the materials used are poor with the result that the repair would deteriorate or fail in a relatively short period, meaning that they would then to contact the CHO again.</p> <p>3. On occasions, some tenants will ask the contractor to undertake additional work that they have found. This may relate to the original repair request, however, the majority of tenants stated that contractors will only follow what is stated on the work order. Many expressed the view that the contractor should be able to undertake small changes to the scope of the repair to avoid the need for the tenant to make another repair request.</p> |

| Doing & Actions Taken | | | |
|---|--|---|---|
| Catalyst (Problem Identification) | Initial Action | Progress | Outcome |
| b. Describing a repair to CHO staff c. Having better and easier access to information on what to do when identifying a repair | | | |
| Thinking, Feelings, Mindsets and Emotions | | | |
| Catalyst (Problem Identification) | Initial Action | Progress | Outcome |
| 1. There was a mixture of feelings and emotions at this stage of the journey as follows: a. Comfortable overall but CHO could do better in the information it provides on identifying and reporting repairs. b. CHO staff are trying to do the right thing c. The repairs service is the best thing about this CHO d. Generally, repairs service is ok. e. More information is needed about fixtures and fittings either in the home or in communal areas e.g., i. Knowing where the mains power is located ii. How to get rubbish removed more easily | 1. For those preferring to report the repair by phone, on the whole they experience a relatively reliable service, although as some pointed out, this depends on who they speak to. 2. Some felt confident and / or assured that their repair request would be dealt with and processed. 3. A lesser number did not share that level of confidence when reporting repair requests. 4. A small number of tenants feel like they are “just a number in the system” in other words they felt they were not treated seriously or as a customer should be. 5. In terms of how tenants typically feel at this point of the repair request journey, scoring was as follows: a. 12 scored the CHO in the region of 8-10 (i.e., good to excellent) | 1. For many, trying to find out the progress of a repair proves to be a totally different experience compared to their experience in reporting the repair. 2. As noted above, approximately 30% of attendees regularly need to call the CHO to follow up on progress of the repair, with many finding this a frustrating or irritating process. 3. Due to the lack of clarity as to what constitutes a non-urgent repair, some tenants believe their request is urgent however they then discover when enquiring on progress that the CO has categorised it as non-urgent. This causes varying degrees of frustration. 4. Not knowing when the repair will be done also leads to feelings of frustration, with some saying they become anxious or upset on occasions, simply because they do not know what is happening. | 1. Some become annoyed or irritated if a tradesperson does not clean up after completing the work. 2. Some are frustrated or annoyed if the quality of the work is poor. 3. Some tenants feel anxious or worried if they need to complain about the quality of work. Some felt they should not need to do this. 4. Some would report poor quality work to their Tenancy Manager however some stated that action does not always result and they would then need to report the issue again, compounding their level of frustration and irritation. 5. Some felt they have no option but to “like it or lump it” in terms of the quality of the work. 6. Delays in getting work done and finally complete are irritating, annoying and frustrating. Such feelings compound |

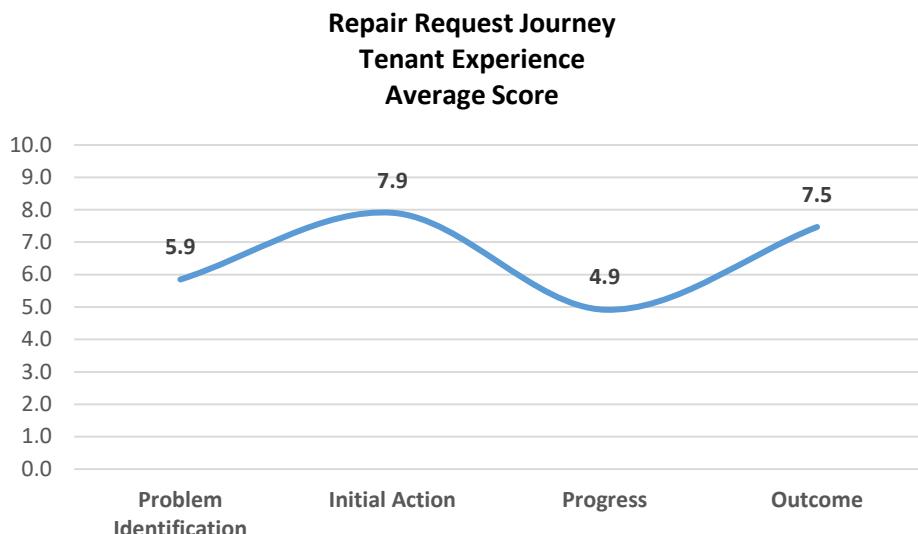
| Thinking, Feelings, Mindsets and Emotions | | | |
|---|--|--|---|
| Catalyst (Problem Identification) | Initial Action | Progress | Outcome |
| <p>f. It is challenging when repairs faults arise out of office hours in terms of knowing what to do or how to report the problem.</p> <p>g. Frustrated in knowing how to describe the problem and how to report it.</p> <p>h. Identifying and then reporting repairs is a “nightmare.”</p> <p>2. Ten tenants were willing to express a score out of 10 for their experience at this stage in the journey. Scores ranged from 10 (excellent) to 2 (poor). Taking into account all scores given, the overall average for this phase of the journey was 5.9</p> | <p>b. 3 scored the CHO in the region of 4-7 (i.e., minor deficiencies to broadly satisfactory)</p> <p>c. 1 scored the CHO in the region of 0-3 (i.e., very poor to poor)</p> <p>6. Overall, this would equate to an average of 7.9 for the experience from their initial actions in contacting the CHO to submit the repair request.</p> | <p>5. In terms of how tenants typically feel at this point of the repair request journey, scoring was as follows:</p> <ul style="list-style-type: none"> a. 3 scored the CHO in the region of 8-10 (i.e., good to excellent) b. 4 scored the CHO in the region of 4-7 (i.e., minor deficiencies to broadly satisfactory) c. 5 scored the CHO in the region of 0-3 (i.e., very poor to poor) <p>6. Overall, this would equate to an average of 4.91 (less than satisfactory) for the experience in finding out the progress of their repair request.</p> | <p>their views on the quality, reliability and efficiency of the CHO’s repair service.</p> <p>7. Another source of frustration was contractors not willing or able to undertake any additional work found when on-site i.e., a variation to that originally ordered. Some tenants stated that tradespeople would tell them to contact the CHO and report the matter so that a new work order can be issued. Others anticipated this would result in higher costs to the CHO if the contractor has to visit the home many times.</p> <p>8. In terms of how tenants typically feel at this point of the repair request journey, scoring was as follows:</p> <ul style="list-style-type: none"> a. 11 scored the CHO in the region of 8-10 (i.e., good to excellent) b. 3 scored the CHO in the region of 4-7 (i.e., minor deficiencies to broadly satisfactory) c. 2 scored the CHO in the region of 0-3 (i.e., very poor to poor) <p>9. Overall, this would equate to an average of 7.5 for the experience at the outcome stage of the journey.</p> |

Experience / Feelings Summary

An average was taken of the scores for each phase for the journey where:

- 8-10 is deemed as being good to excellent
- 4-7 is deemed as minor deficiencies to being broadly satisfactory
- 0-3 is deemed as being very poor to poor

As can be seen the progress phase has the lowest average score.



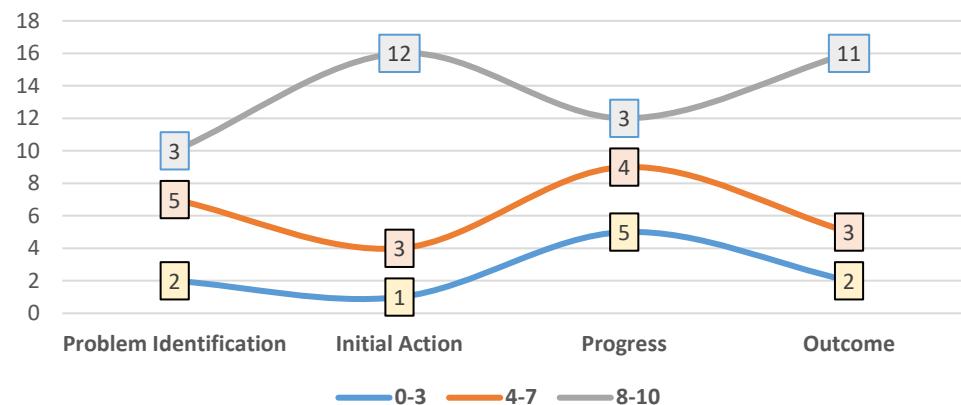
Scores were counted for each category of 0-3; 4-7 and 8-10

- Most are broadly satisfied in how they can identify problems
- The vast majority of tenants are happy with the way the CHO receives their repair request
- For the majority, their experience in the progress phase is very poor to poor.
- The vast majority have a good experience at the outcome phase

Repair Request Journey

Tenant Experience

Score by Range



Pain Points and Issues

| Catalyst (Problem Identification) | Initial Action | Progress | Outcome |
|---|---|---|---|
| <ol style="list-style-type: none"> Some tenants stated it was hard to get information on repair reporting from staff. Some stated that staff do not always return calls if a tenant calls for assistance on what to do. | <ol style="list-style-type: none"> It is hard on occasions to get information from staff once the repair is reported as to when it will be done, depending on who you talk to. Staff do not always know the current position or status of some repairs. | <ol style="list-style-type: none"> For many the biggest issue was not knowing when the repair would be done by the contractor. Many reported that a contractor would just turn up at a property without any prior notification. | <ol style="list-style-type: none"> Quality of work was a key issue as well as poor quality materials being used. Some questioned if all contractors were using the same type of materials or whether some were using lesser quality as it would be cheaper. |
| | | | |

| Pain Points and Issues | | | |
|-----------------------------------|--|--|---|
| Catalyst (Problem Identification) | Initial Action | Progress | Outcome |
| 1. | <ul style="list-style-type: none"> 3. There is little consistency amongst the contractors used by the CHO in terms of how they interact with tenants and the quality of their work. This could therefore imply a need for greater training. 4. Some staff are not always courteous. 5. The topic of feeling like a number was raised by 2 tenants. 6. When reporting repairs to the repair response line, some tenants are directed to reception if the call is not answered. 7. Some tenants are not advised of the priority of some repairs and some do not know what the priority classification covers. | <ul style="list-style-type: none"> 3. No appointments are set up. 4. Some contractors may specify a time but arrive late or at night to do the work with no notification being given to the tenant that they may be delayed elsewhere. | <ul style="list-style-type: none"> 3. A small number of tenants were concerned or anxious as to using new technology if the CHO introduced it. One said he was terrified of it. 4. A concern for one tenant in using new technology was that it must be used all the time otherwise there is a tendency to forget what you have learnt or been told. 5. Similar to the other phases of the journey, poor communication on work progress and attending on site was a major issue. 6. Some tenants stated that on occasions getting work done can take up to 6 months which they were not happy about. As indicated above, delays cause irritation and frustration. |

| Outcomes and Learnings: Improvements | | | |
|--|--|--|---|
| Catalyst (Problem Identification) | Initial Action | Progress | Outcome |
| <ul style="list-style-type: none"> 1. CHO should hold training for tenants on identifying and reporting repairs. 2. A separate newsletter should be published solely on repairs, setting out the steps in the repair process. 3. Provide guidance on troubleshooting and identifying repairs. | <ul style="list-style-type: none"> 1. Reporting a repair online would provide proof of the date when the issue was logged. 2. Tenants would have visibility if an online facility was provided. 3. Generate acknowledgement when repair request has been logged. This could be provided through an online app. Alternatively email or SMS could be used for those tenants not wishing to use an online channel. Note that the small | <ul style="list-style-type: none"> 1. An online portal could show the status of the repair i.e., when it had been issued to the contractor and the tenant would then know it is being processed. 2. On that theme, introduction of a tracking system similar to the parcel delivery service would be very useful so tenants could know that the contractor has received the work order and when a tradesperson was en-route to carry out the work. | <ul style="list-style-type: none"> 1. A job should not be completed until the tenant signs off. 2. An online portal could show the status of the repair being completed so tenants would have visibility over the whole repair request process. 3. For those tenants who are anxious about using new technology, training sessions would be a good initiative to provide them with confidence and to know what to do. Some tenants mentioned that they |

| Outcomes and Learnings: Improvements | | | |
|--|---|--|--|
| Catalyst (Problem Identification) | Initial Action | Progress | Outcome |
| <p>4. Provide a diagnostic or diagrammatical method for identifying repairs, which could also be provided on the CHO's web site</p> <p>5. Provide a directory or manual on typical repair items.</p> <p>6. Repairs could be reported to the CHO's Tenant Advisory Groups.</p> <p>7. Display flyers in CHO communal buildings providing the repairs hotline telephone number.</p> <p>8. Ensure all maintenance issues are fixed in a new building before it is handed over.</p> | <p>number of tenants who use email to report repairs stated they receive an instant response and were very happy with this level of service.</p> <p>4. More clarity could be provided on the repairs process in the welcome pack at the tenancy sign-up stage.</p> <p>5. Provide better information on priority categories.</p> <p>6. Provide better information on planned maintenance programmes and specifically:</p> <ul style="list-style-type: none"> a. Work included in such programmes b. When programmes are scheduled c. Impact of planned work on responsive repair requests | <p>3. Contractor should contact the tenant to provide a general time window when a tradesperson will visit e.g., morning or afternoon. (Note that above some tenants stated they do receive SMS messages from contractors).</p> <p>4. For those not having online access or wishing to use such a channel, the contractor should issue an SMS to the tenant to confirm receipt of the work order and when it was scheduled for completion.</p> <p>5. Contractor to contact the tenant after 5 days to provide an update.</p> | <p>have attended technology learning classes previously from other providers but found it very frustrating or not useful. It was suggested that the CHO needs to consider how best to provide technology familiarisation education sessions and assess how it could encourage tenants to attend.</p> <p>4. Ten tenants stated they would be enthusiastic to attend any training / familiarisation that the CHO</p> <p>5. Provide guidance and information on the entire repair request process in different languages to make it more accessible.</p> <p>6. Manage contractors better so as to provide better workmanship or quality of the work.</p> <p>7. Ensure contractors use good quality materials.</p> |

CHO 2 - Staff Journey: Repair Request

CHO 2 Metropolitan NSW Tier 1 Provider

Repair Request Journey

Staff Persona Workshop

8 February 2022

Persona Overview

The workshop was attended by staff in the following roles:

| Role | Years' Experience in Housing |
|--|---|
| 1. Executive Director, Customer & Communities | Over 30 years |
| 2. Executive Director, People, Culture & Brand | 9 months at CHO, previously no experience in housing |
| 3. Director, Assets | 6 years |
| 4. Manager, Business Transformation Projects, | |
| 5. Manager, Service Improvement & Innovation | 18 years |
| 6. Manager, Asset Programs | 15 years |
| 7. Contract Manager | 10 years |
| 8. Team Leader, Housing | |
| 9. Housing Manager | |
| 10. Customer Services Officer Assets x 4 | 2 staff with 3 months experience, 1 with 10 months experience and 1 with 5 years' experience |
| 11. Maintenance Contractor representatives x 2 | |
| a. General Manager Operations | Experience of working in community housing at a senior level; software companies and now in facilities management |
| b. Team Leader | |

| Doing & Actions Taken | | | |
|--|--|--|---|
| Catalyst (Problem Identification) | Initial Action | Progress | Outcome |
| <p>1. Details on how tenants can submit repair requests are provided on:</p> <ul style="list-style-type: none"> o CHO web site o In the sign-up pack o Periodically in newsletters o Fact sheets <p>2. The Housing Manager checks in with new tenants approximately 8 weeks after sign-up. This visit is used to clarify whether the tenant has any issues or problems and can include answering questions on how to report repairs.</p> <p>3. The annual condition report visit is also used to identify repair issues and again answer any questions tenants may have on repairs.</p> <p>4. Tenants are encouraged to report repair issues before the inspection takes place.</p> <p>5. Assets staff also advise tenants how to report repairs.</p> <p>6. The web site sets out how tenants can submit repair requests and provides a form which tenants can submit.</p> | <p>1. Tenants usually report repairs to Housing Managers rather than the repairs team.</p> <p>2. In such situations, if a Housing Manager receives a call, repair details are manually noted on paper and the tenant is verbally advised of the timeframe for when the repair will be completed.</p> <p>3. Housing or reception staff email the repairs team in order that the request is logged in the housing management system.</p> <p>4. Some tenants submit repair requests by email, which are received into an inbox solely used for repair requests.</p> <p>5. No repair acknowledgement is sent to the tenant apart from what the Housing Manager may have verbally told the tenant although some staff reported that SMS is used to confirm receipt of the request. Communication is mainly verbal at the point of contact.</p> <p>6. Touchpoints for this phase are with:</p> <ul style="list-style-type: none"> a. Tenants in dealing with the enquiry b. Housing staff liaising with repairs staff c. Reception staff liaising with repairs staff and which may also include liaison with housing staff. | <p>1. Responding to an enquiry on progress of a repair request is dependent on the original contact channel. If a tenant has submitted a request by email, this channel will continue to be used, otherwise contact is typically by phone.</p> <p>2. Housing Managers do not have access to the housing management information system to view where the current status of the repair order. The vast majority of tenants will contact their Housing Manager to find out when the work will be done.</p> <p>3. CHO staff do not know when the contractor will be making contact with the tenant.</p> <p>4. Repairs staff have view only access to the contractor's system. Housing staff do not.</p> <p>5. Upon receiving an enquiry from a tenant on the progress of a repair request, Housing Managers therefore need to liaise with the repairs team as to the status of a repair and when it will be progressed. Such internal contact could be face to face in the office, by email or by phone. In many instances, email is used.</p> <p>6. A significant number of repetitive phone calls are received from tenants enquiring on progress of their repair requests.</p> <p>7. Staff acknowledged this must be frustrating for tenants in having to repeat their question and issues over and over.</p> | <p>1. When a responsive repair has been completed, the contractor notifies the CHO repairs team.</p> <p>2. The contractor also advises when planned work has been completed.</p> <p>3. Audits on planned work are then undertaken to check the quality of the work.</p> <p>4. Repairs staff record the completion date in the housing management system.</p> <p>5. Both the CHO and the contractor seek feedback from the tenant on the quality of the work.</p> <p>6. The CHO provides a postcard with a QR code for tenants to answer questions on the quality of the work.</p> <p>7. The contractor also phones the tenant at the end of the month to check on the quality of the work and to determine if there are any issues.</p> <p>8. Touchpoints for this phase are:</p> <ul style="list-style-type: none"> a. Contractor staff with the tenant in being on-site b. Contractor staff advising repairs staff when work is complete c. Housing staff with tenants in dealing with quality of work issues and in administering tenant satisfaction, based on feedback being received |

| Doing & Actions Taken | | | |
|--|---|--|--|
| Catalyst (Problem Identification) | Initial Action | Progress | Outcome |
| | | <ul style="list-style-type: none"> 8. Technical Officers in the Assets team manage planned maintenance. Letters are sent to tenants providing information on each planned programme, its content and how it will impact each tenant. 9. Touchpoints for this phase are with: <ul style="list-style-type: none"> a. Tenants in dealing with the enquiry b. Housing staff liaising with repairs staff c. Repairs staff liaising with contractor staff | <ul style="list-style-type: none"> d. Housing staff with repairs staff on resolving quality issues. e. Repairs staff with contractor staff in dealing with quality of work issues and also with work variations. |
| Thinking, Feelings, Mindsets and Emotions | | | |
| Catalyst (Problem Identification) | Initial Action | Progress | Outcome |
| <p>Staff were asked how they think tenants may feel when attempting to diagnose a repair issue before contacting the CHO. The following comments were made:</p> <ol style="list-style-type: none"> 1. Tenants may feel anxious as they may have difficulty communicating or describing the repair 2. Tenants are more than likely hoping for a quick turnaround of their issue 3. Some tenants may feel they do not want to be a nuisance to the CHO. 4. Some tenants may feel frustrated based on past experience with the CHO. 5. Due to past history, some tenants may feel their experience will be exactly the same as the last one. | <ol style="list-style-type: none"> 1. A view commonly shared was that after reporting the repair and from this point onwards, tenants are typically left in the dark as to what is happening as well as when anything will happen due to the lack of official confirmation or updates. 2. As the repair is processed, as one housing manager said, in effect it disappears into "a black hole of information." 3. Email was seen as a clunky method of internal communication, prone to error in conveying the information and was difficult to track. 4. Staff felt tenants would more than likely have different experiences due to the contact channel used. 5. As a result of the above, staff expressed this initial action phase causes the following feelings subject to the nature of the type of repair request being made: | <ol style="list-style-type: none"> 1. Staff could understand that for tenants needing to follow up on progress, this must be a big pain point for them. 2. Housing Managers stated they feel they are working in the dark most of the time in relation to finding out details on the progress of work orders, which is a major frustration. High levels of frustration were expressed with some housing staff feel like they "are passing the buck" in not being able to give tenants an answer due to current internal processes on communications, lack of system access and the current silo-based structure. | <ol style="list-style-type: none"> 1. The completion process is convoluted which again leads to varying degrees of frustration, due to the lack of transparency on work order progress and the current internal communication mechanisms. 2. Some staff felt the scale of changes needed could not be done in a short space of time. 3. 7 attendees rated the experience for this part of the repair request journey as being in the 4-7 category (broadly satisfactory but |

| Thinking, Feelings, Mindsets and Emotions | | | |
|--|---|--|-----------------------------|
| Catalyst (Problem Identification) | Initial Action | Progress | Outcome |
| <p>6. Some tenants may be fearful or anxious they may be blamed for the repair they are reporting.</p> <p>7. For those where English is their second language, they may well wait until the Housing Manager visits.</p> <p>8. As a result of the above, some may also feel nervous.</p> <p>9. Based on their perceptions and their feelings on how the CHO provides services and advice, all attendees rated the experience for this part of the repair request journey as being in the 4-7 category (broadly satisfactory but with room for improvement).</p> | <p>a. Frustration</p> <p>b. Stress which varies in relation to the specific situation</p> <p>6. Staff were also concerned as to the impact of slow turnaround and not responding to certain types of repairs more quickly. An example of this related to water leaks arising such as roof leaks due to work being scheduled in a planned maintenance programme.</p> <p>7. Staff were also conscious that tenants do not know the process and Housing Managers need to provide reassurance to some tenants at times which contributes to their stress levels. It was reported that tenants do however, seem to be satisfied after being reassured.</p> | <p>4. Some used the word 'annoyance' to describe their feelings with the current process.</p> <p>5. There is also frustration in having to follow up tenant enquiries on the basis that work should have been done within priority timeframes. The enquiry from the tenant is typically the first time that the Housing Manager will know that the work has not yet been done.</p> <p>6. All attendees rated the experience for this part of the repair request journey as being in the 4-7 category (broadly satisfactory but with room for improvement).</p> | with room for improvement). |

| Experience Summary | | | | | | | | | | | | | | |
|--|---|---|--|--|-------|-------|------------------------|-----|----------------|-----|----------|-----|---------|-----|
| <p>All attendees scored each phase the same. No participants were able to state that they had a good experience across any part of the journey nor did they have particularly bad experience. All attendees felt that their experience to be broadly satisfactory but could be better if improvements were made in relation to:</p> <ul style="list-style-type: none"> 1. Organisational structure 2. Internal communications 3. Customer service processes 4. Current information systems 5. New digital initiatives <ul style="list-style-type: none"> a. Tenant portal b. Chatbots c. Automation d. Workflow e. Dashboards | | | | | | | | | | | | | | |
| | | <p>Repair Request Journey Staff Experience</p> <table border="1"> <thead> <tr> <th>Phase</th> <th>Score</th> </tr> </thead> <tbody> <tr> <td>Problem Identification</td> <td>5.5</td> </tr> <tr> <td>Initial Action</td> <td>5.5</td> </tr> <tr> <td>Progress</td> <td>5.5</td> </tr> <tr> <td>Outcome</td> <td>5.5</td> </tr> </tbody> </table> | | | Phase | Score | Problem Identification | 5.5 | Initial Action | 5.5 | Progress | 5.5 | Outcome | 5.5 |
| Phase | Score | | | | | | | | | | | | | |
| Problem Identification | 5.5 | | | | | | | | | | | | | |
| Initial Action | 5.5 | | | | | | | | | | | | | |
| Progress | 5.5 | | | | | | | | | | | | | |
| Outcome | 5.5 | | | | | | | | | | | | | |
| Issues and Pain Points | | | | | | | | | | | | | | |
| Catalyst (Problem Identification) | Initial Action | Progress | Outcome | | | | | | | | | | | |
| <ul style="list-style-type: none"> 1. Staff believed that tenants are likely overwhelmed with the information given to them at sign-up. 2. Participants acknowledged that it is difficult for tenants to get through to talk to a staff member. 3. Call centre staff are not technical, which sometimes can lead to issues in recording accurate details of the problem. 4. The difference between responsive and planned (or deferred) maintenance is unclear in varying | <ul style="list-style-type: none"> 1. A key aspect of the initial action phase for staff when dealing with tenants is to clearly manage expectations. 2. Issues often arise due to the lack of visibility on work order status between the housing and repairs teams as well as the contractor. As housing staff do not have access to the repairs module and with emails being sent to the repairs team to log the job, it is assumed that this will happen. | <ul style="list-style-type: none"> 1. Housing staff previously had view only access to the repairs module in the housing management system, however, due to licensing and cost implications, this was withdrawn such that only the repairs team has access to log and administer work orders. 2. The lack of system access exacerbates feelings of frustration and of "passing the buck" since housing staff are then unable to fully answer tenant questions. Housing staff stated that it is often the case that they advise the tenant that they will get back to them, knowing that this response must likewise frustrate the tenant. | <ul style="list-style-type: none"> 1. Housing staff are not aware when a job has been completed as they do not have access to the housing management system. 2. Housing staff receive calls from tenants complaining about the quality of work, which will then result in internal communication with the repairs team. 3. A comment was made that whilst there is a strong focus on the tenant experience, this is not the case in relation to how staff administer repairs. | | | | | | | | | | | |

| Issues and Pain Points | | | |
|---|---|--|--|
| Catalyst (Problem Identification) | Initial Action | Progress | Outcome |
| <p>degrees to some housing and reception staff.</p> <p>5. Staff acknowledged how the problem identification phase may well be annoying for tenants.</p> | <ul style="list-style-type: none"> 3. Housing staff reported that making promises without confirmation from the repairs team poses issues. 4. The black holes of communication between housing, repairs and then the contractor is a significant issue, due particularly to reliance on email and lack of visibility or access in use of systems. 5. CHO staff do not know when the contractor will make contact with the tenant | <ul style="list-style-type: none"> 3. Consequently, housing staff do not feel they are providing good customer service. 4. Housing Managers stated they need visibility on work orders and have access to the system. 5. The current organisational structure combined with lack of system access for Housing Managers means the process is highly manual, highly convoluted and inefficient. Many staff commented that the current structure results in constant communication back and forth between teams. 6. There is a lack of understanding amongst tenants as to the distinctions between responsive repairs and planned works, such that enquiries on progress are made to the wrong person, which is a particular pain point. | <ul style="list-style-type: none"> 4. There is much time wasted due to current internal communication channels and lack of system access. |

| Outcomes and Learnings: Improvements | | | |
|--|---|--|--|
| Catalyst (Problem Identification) | Initial Action | Progress | Outcome |
| <ul style="list-style-type: none"> 1. Need to better set out questions to enable tenants to identify and diagnose repair issues. 2. Guidance would be better structured in terms of: <ul style="list-style-type: none"> a. Framing repairs as to the types of problems which commonly arise b. How best to identify the problem c. How to contact the CHO. | <ul style="list-style-type: none"> 1. CHO needs to be more proactive in terms of how tenants know what is happening. 2. Send SMS confirmation when a work order has been issued to the contractor. 3. Consider changing the wording of SMS messages using words such as "thanks" etc and make messages more personable. 4. Implement tenant portal to enable tenants to see that their request has been logged and when a work order has been issued to the contractor. | <ul style="list-style-type: none"> 1. Housing staff need access to the repairs module of the housing management system. The licensing issue needs to be resolved. 2. Improve the mechanisms by which tenants can view information on their repair request directly. A tenant portal can be used to support this. 3. In terms of customer service, staff stated they need to find ways of reducing the number of instances where they advise the tenant they will need to check and get back to them. Transparency of work order status across the | <ul style="list-style-type: none"> 1. Develop a digital strategy to support improvements across the whole process. 2. Consider the introduction of a parent / child work order structure to support work order variations. 3. Assess how current systems can support this approach. 4. Review and improve how data is shared across the CHO and with the contractor. 5. Review the current process and system usage to enhance the user experience. |

| Outcomes and Learnings: Improvements | | | |
|---|--|---|---|
| Catalyst (Problem Identification) | Initial Action | Progress | Outcome |
| <p>3. Greater clarity is needed to make this process easier for tenants and stop using in-house terminology.</p> <p>4. Need to think how best to re-phrase terminology to plain English.</p> <p>5. Need to make terminology more tenant friendly on the web site and in communications.</p> <p>6. Implement a smartphone app to enable tenants diagnose repair issues and then submit repair requests (as part of an overall tenant portal).</p> <p>7. Need to better set out timeframes for emergency; urgent and non-urgent repairs and provide details of the types of repairs which fit into each category.</p> <p>8. The need for change in terms of HOW the CHO advises tenants of repair timeframes was suggested. This therefore indicates a need for: <ul style="list-style-type: none"> a. Improved training b. Improved and simpler procedural documentation </p> <p>9. Need to link repair diagnostics and reporting with the CHO web site rather than just rely on a text-based form.</p> <p>10. Non-technical templates should be designed to enable tenants to</p> | <p>5. Encourage tenants to use the portal when it is implemented.</p> <p>6. Consider how training programmes or digital champions could be used so tenants are confident in using such a service.</p> <p>7. Introduce live chat through the portal.</p> <p>8. All repairs are important to tenants. Mindsets need to be improved across the organisation to provide better customer service.</p> | <p>CHO would improve this situation as would either having access to the contractor's system to know the current position in work allocation or to have improved contractor communication.</p> <p>4. A contractor portal would help to resolve the current situation however, such a feature is not provided by the supplier of the CHO's current housing management system.</p> <p>5. Consideration needs to be given to a centralised process where all staff can access information to view updates on work order processing.</p> <p>6. It was suggested that in terms of responsive repairs, ownership should be with the staff member who raises the repair request, hence a centralised customer service approach is needed.</p> <p>7. Although not mentioned, many of the internal communication issues could be addressed through automation; task driven workflow and dashboards. This would require either enhancements to be developed by the CHO's existing housing management system supplier or for the CHO procure a replacement system. Clearly both options would take time to implement. Furthermore, the CHO would need to re-assess both its structure and procedures to derive the benefits that automation and workflow software can offer.</p> | <p>6. Implement a phone survey to measure satisfaction as a baseline.</p> <p>7. CHO satisfaction cards should be provided by the contractor's staff upon completion of the work.</p> <p>8. Assess ways to measure employee experience.</p> <p>9. Implement automation and task driven workflow software to improve communications and transparency on responsive maintenance management across the organisation.</p> <p>10. Improving staff experience can be a factor in increasing staff retention.</p> |

Digital Transformation
05 Persona Journey Mapping

| Outcomes and Learnings: Improvements | | | |
|---|-----------------------|---|----------------|
| Catalyst (Problem Identification) | Initial Action | Progress | Outcome |
| better identify repair issues and then report them. | | 8. For tenants not using or wanting to use a portal, SMS notifications could be sent advising that their request will be actioned and when it has been actioned | |