



STRATEGIC PLANNING
THEATRE

How Optivo kept customer service and customer satisfaction high during a period of change

- Jane Porter, Chief operating officer, Optivo

www.sli.do #CX2019Strategy

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learning

CAPITA



BUILDING HOMES
MAKING PLACES
ENHANCING LIVES

Keeping Customer Satisfaction High During Change

Jane Porter
Chief Operating Officer

CX 2019, London

Who are we?

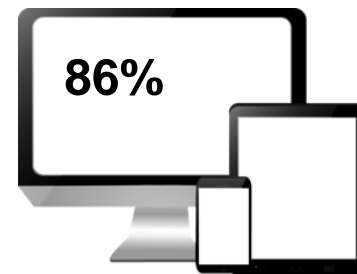
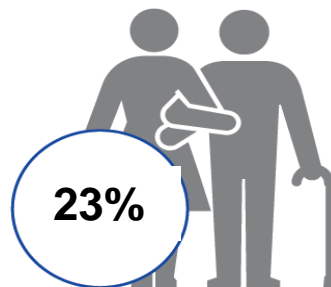
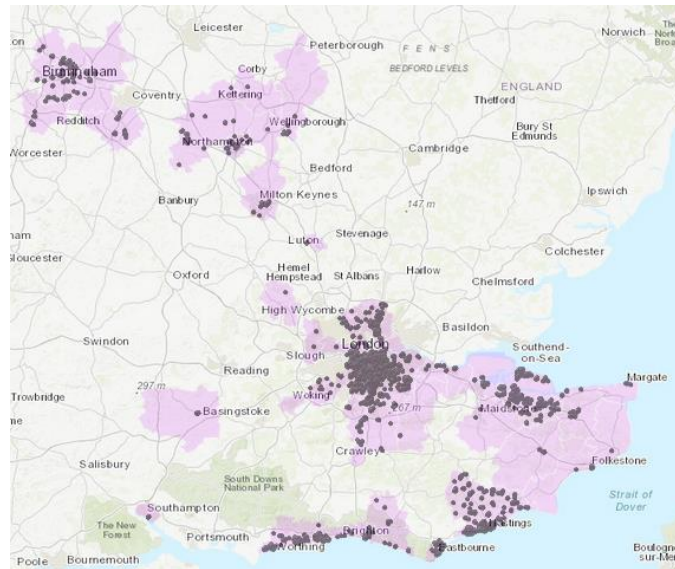
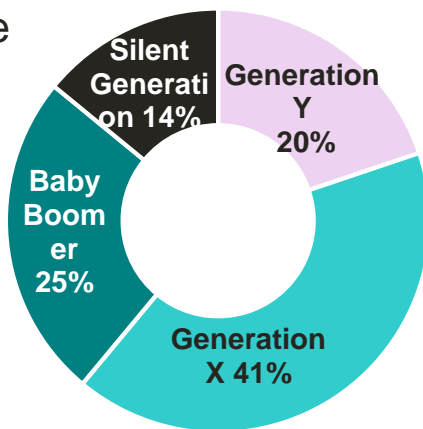


◆ Over 90,000 residents

◆ 43,000 homes

- 68% General needs
- 9% HOPs/ Retirement
- 12% Homeowners
- 8% Commercial (student, keyworker)
- 3% Supported Housing

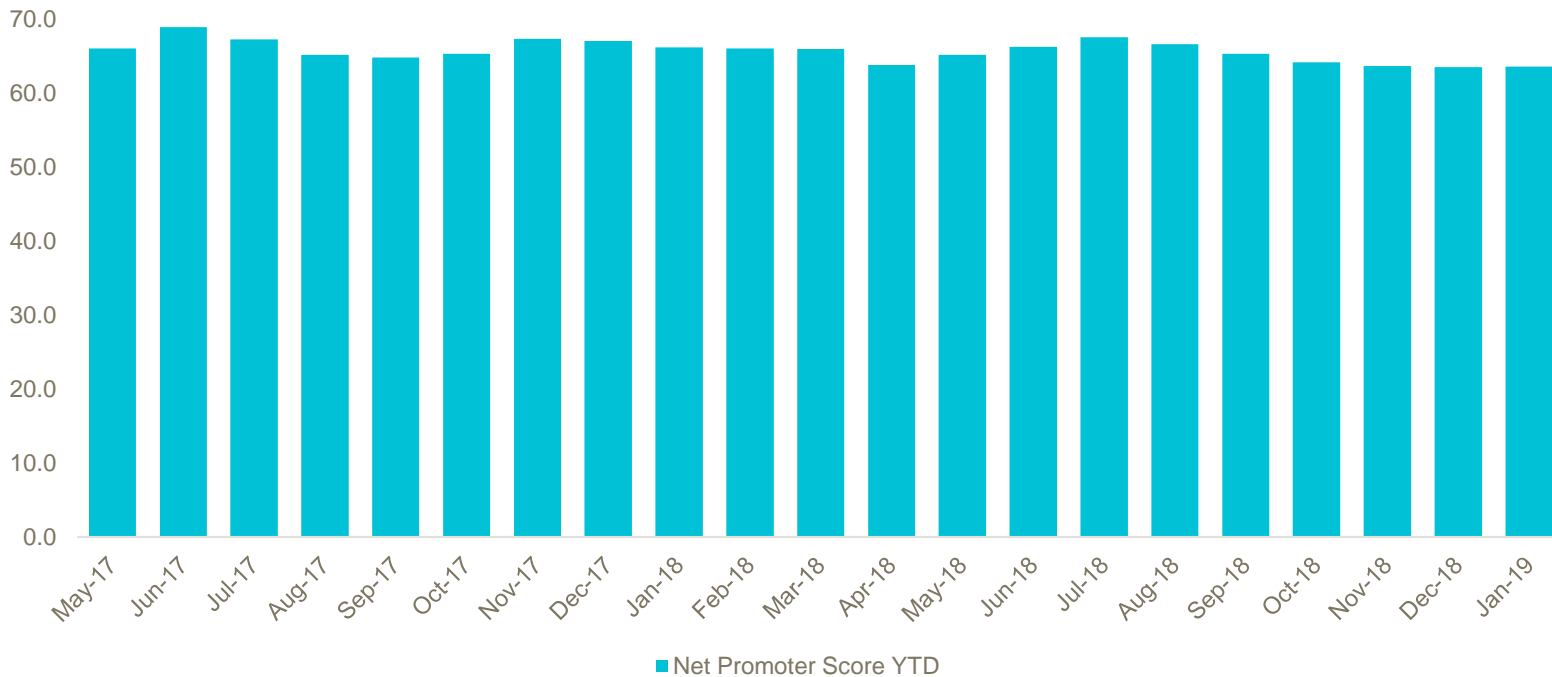
◆ Resident profile



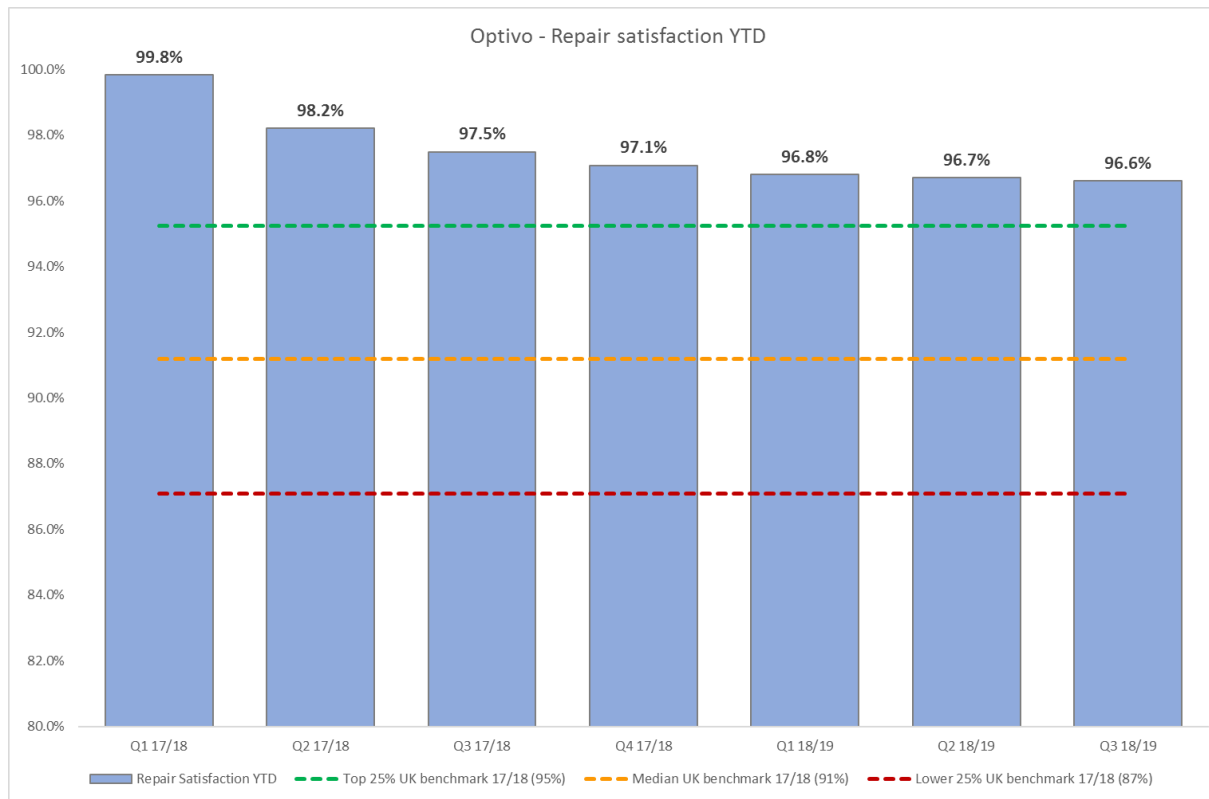
Satisfied customers?



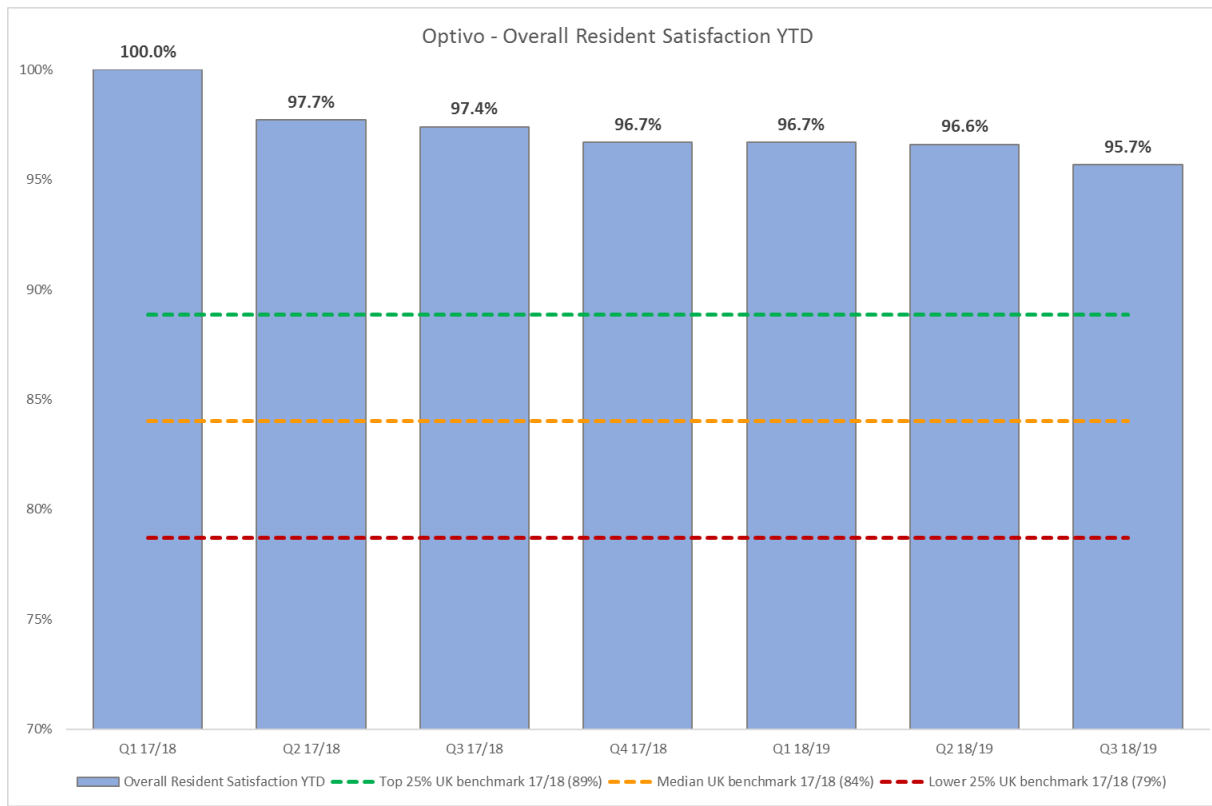
Optivo - Net Promoter Score YTD



Satisfied customers?



Satisfied customers?





Key principles



**“Everything you
think, feel, say and do
is either a service or a disservice to
yourself and everyone around you”**

Mary Gober

Customer Expectations





Our values...



 **Customer Focused**

 **One Team**

 **Respect**

 **Enthusiastic**



How?

Listening to Customers



YOUR M&S

John Lewis



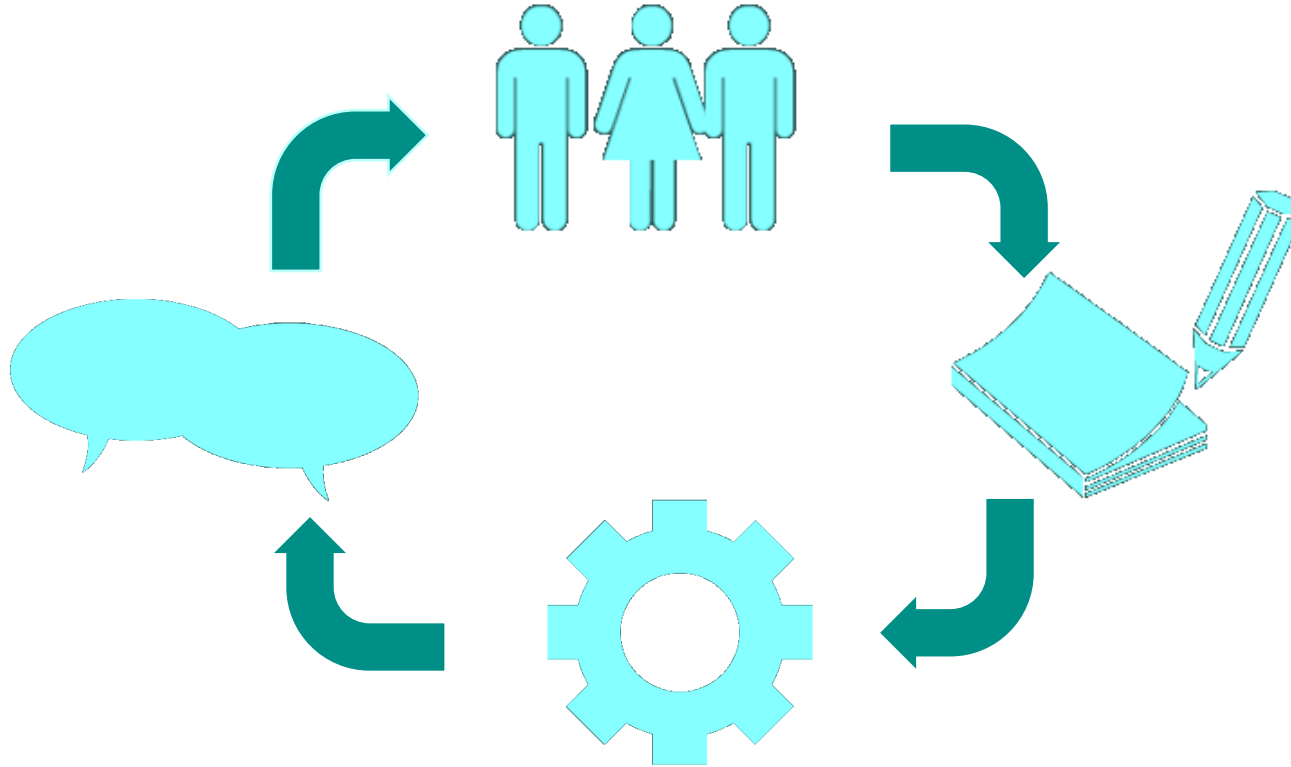
TESCO

Below the word "TESCO" are five parallel blue diagonal lines that serve as a decorative underline.

Satisfaction Drivers



Co-Create



Get ahead.....



Customer Centered Culture



Communicate the vision



Learning from others
























Know your customers

5 Generations



Characteristics	Silent Generation (born Pre 1945)	Baby Boomers (born 1945 – 1960)	Generation X (born 1961- 1980)	Generation Y (born 1981 – 1999)	Generation Z (iGen) (born after 2000)
Formative experiences ¹	Second World War Rationing Fixed gender roles Nuclear families Rock n Roll	Cold War Post war boom Swinging sixties Apollo Moon landings Family orientated Rise of the teenager	Fall of Berlin Wall Live Aid Intro of first PC Working parents Latch key kids Rising levels of divorce	9/11 terrorist attacks Reality TV Environmental awareness Google Earth Rise of Social Media	Economic downturn Global Warming/ Energy Crisis Mobile devices/ Cloud Gay marriage/ First African-American US President Arab Spring Wiki-leaks
Optivo residents ¹	15%	26%	40%	19%	0%
UK population	12%	21%	33%	31%	3%
Attitude to technology	Largely disengaged	Early info adaptors	Digital Immigrants	Digital Natives	Technoholics
Aspiration	Home ownership	Job security	Work-life balance	Flexibility and Freedom	Security & stability
'Hook' ²	Security	Usefulness and Security	Convenience and Flexibility	Ease & Reliability	Ease & Reliability
Signature product	Car 	TV 	PC 	Tablet/ Smartphone 	Virtual reality, integrated devices e.g watch 
Communication media	 Formal letter	 Telephone	  Email and text message	  Text or social media	 Handheld
Communication preference	 Face to Face	 Face to Face ideally Telephone	  Text messaging or email	  Online or text messaging	 Facetime

¹ Optivo residents (General Needs and Housing for older People) as at May 2018 (Lead tenants). UK estimates over 16 (published Nov 2017, Office of National Statistics)

²The benefits of technology you can promote to this group

Personas



Personas





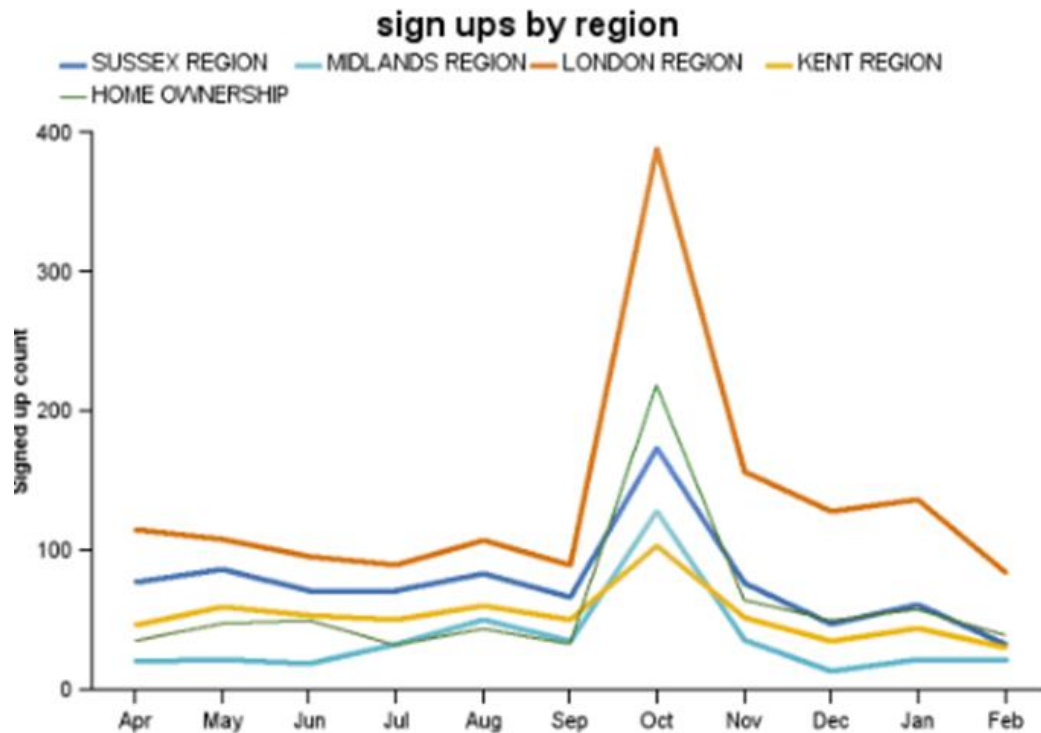
MYACCOUNT

Nudge not shove



Segment	Base Stock Design	Date to send	Letter Key messages
Baby boomer - Kent	A	20 Nov (lands 21-23)	Endorsements & keeping track – digital support
Baby Boomer - London	B	20 Nov (lands 21-23)	Endorsements & keeping track – digital support
Baby Boomer - Sussex	C	20 Nov (lands 21-23)	Endorsements & keeping track – digital support
Generation X - Sussex (Family)	D	27 Nov (lands 28-29)	Time saving & convenience – new app
Generation X – Kent (Family)	D	27 Nov (lands 28-29)	Time saving & convenience – new app
Generation X – London (Family)	E	27 Nov (lands 28-29)	Time saving & convenience – new app
Generation X – Sussex (No Family)	F	27 Nov (lands 28-29)	Easy to use – XX in area already using it – new app
Generation X – Kent (No Family)	F	27 Nov (lands 28-29)	Easy to use – XX in area already using it – new app
Generation X – London (No Family)	G	27 Nov (lands 28-29)	Easy to use – XX in area already using it – new app
Millenials – Sussex (Family)	H	1 Dec (lands 4-5)	Time saving and app
Millenials – Kent (Family)	H	1 Dec (lands 4-5)	Time saving and app
Millenials – London (Family)	J	1 Dec (lands 4-5)	Time saving and app
Millenials – Kent (No Family)	K	1 Dec (lands 4-5)	App and XX already using
Millenials – Sussex (No Family)	K	1 Dec (lands 4-5)	App and XX already using
Millenials – London (No Family)	L	1 Dec (lands 4-5)	App and XX already using

Impact...



End to end processes....

A screenshot of the OPTIVO MYACCOUNT web application displayed on a tablet. The interface shows a navigation menu at the top with "Home", "Services", and "My Requests". Below this is the title "Your housing application" and a series of tabs: "Introduction", "Data Protection Declaration", "Main applicant", "Main applicant - Personal details" (which is the active tab), "Main applicant - Current address", "Main applicant - Address history", "Main applicant - Disabilities", "Joint applicant", "Household members", "About the household", "Interpreter details", and "Form submission". The "Main applicant - Personal details" section contains several form fields, each with a green checkmark indicating successful completion: "Date of birth" (04/12/2000), "Gender" (Male), "Marital status" (Married), "National Insurance Number" (AB123456A), "Economic status" (Full time work (30 hours or more per week)), "Preferred language" (English), and "Interpreter requirements" (I have an interpreter). At the bottom of the form are buttons for "Previous", "Cancel", "Save", and "Next".

Omni - Channel



How can
we help?

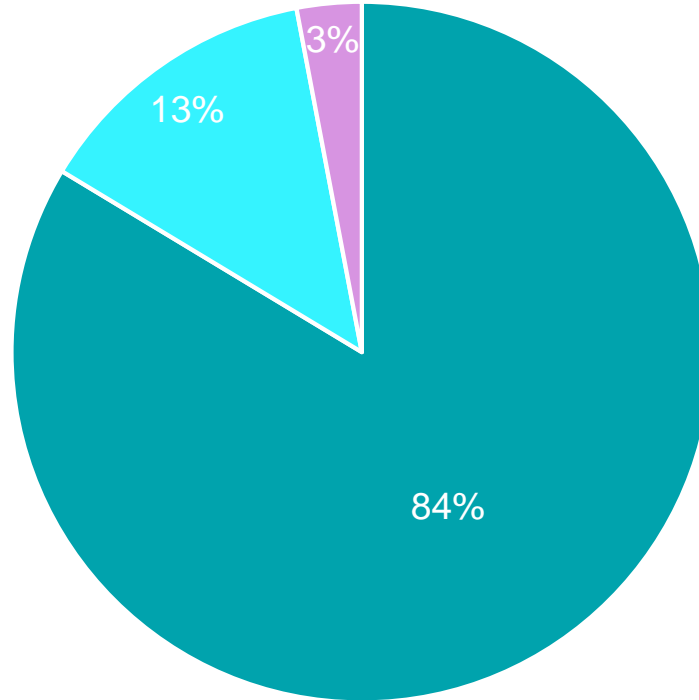
Start Chat



Omni channel but.....



% First

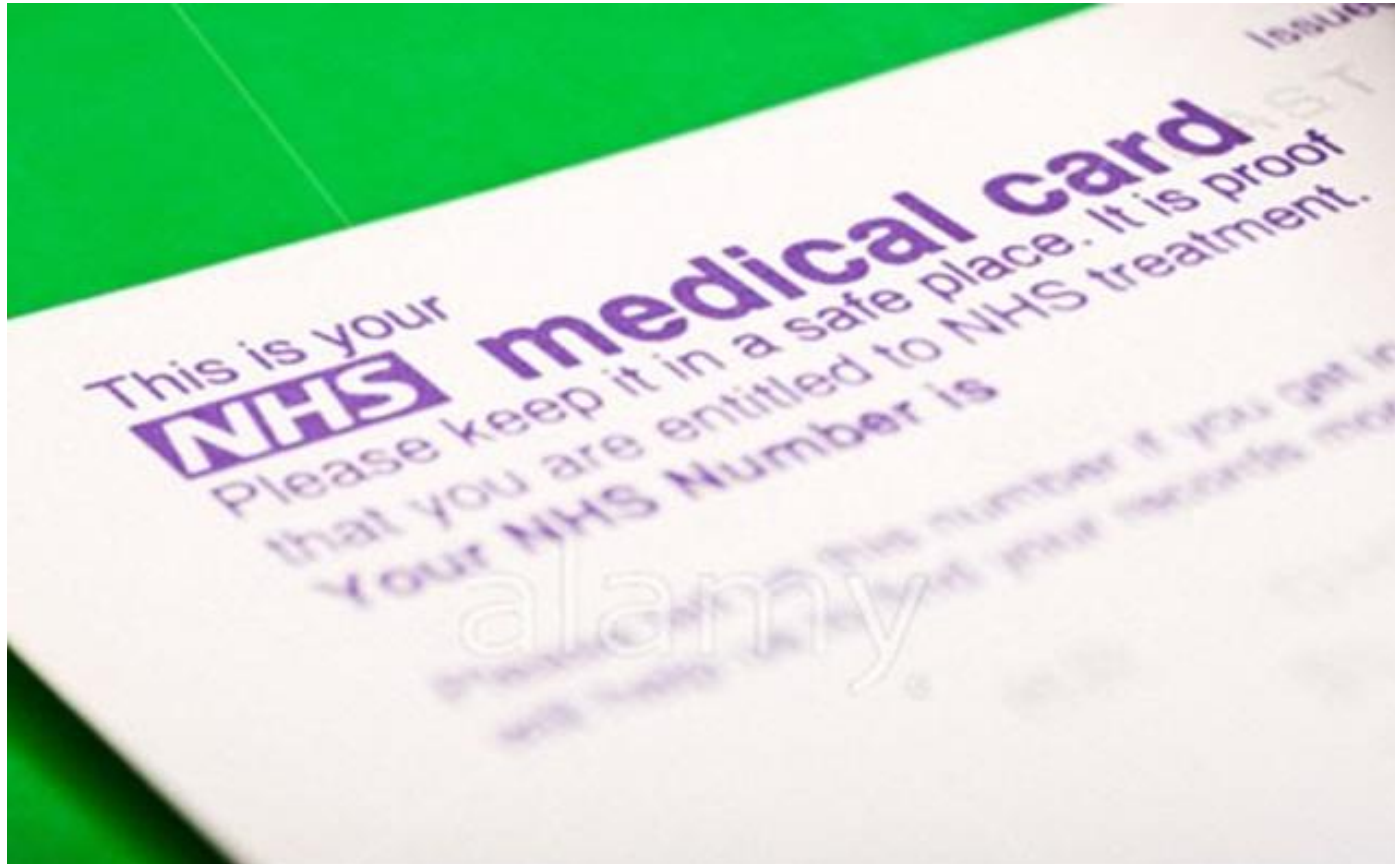


■ Telephone ■ Online ■ Office

Omni – Channel?



Patchless



Relentlessly measure....

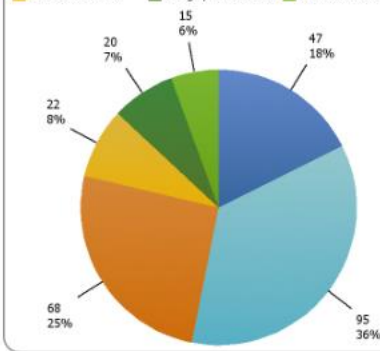


52.58% households signed up to MyAccount to date

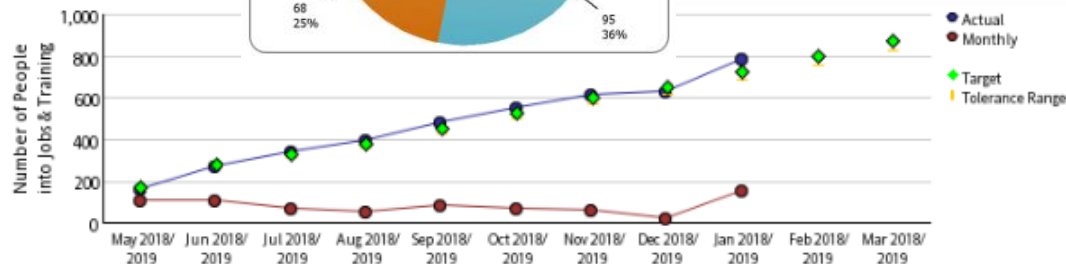
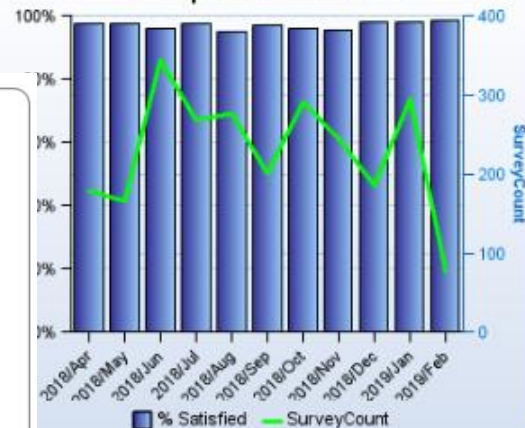
		Y	remaining to reach 55% target	N	55% target	% signed up	Resident Portal Y/N
SUSSEX REGION	East Sussex	1859	-295	685	1564	65.37%	2844
	Hastings	1674	-155	1333	1819	59.59%	3307
	O/V West Sussex	374	85	481	450	44.70%	
	SUSSEX REGION	4207	-365	2779	3842	69.22%	
MIDLANDS REGION	Midlands Patchless	710	199	942	909	42.98%	
	MIDLANDS REGION	710	199	942	909	42.98%	
LONDON REGION	London South West	1221	-66	870	1155	58.14%	
	Croydon and Surrey	1322	-134	838	1188	61.20%	
	London South East	1462	-77	1057	1385	58.04%	
	Partnership	2	2	5	4	28.57%	
	O/V London	1991	1135	3662	3120	35.03%	
	LONDON REGION	5998	860	6471	6858	48.10%	
KENT REGION	Kent Gateway	1177	-114	755	1063	60.62%	
	Mid Kent	1462	-171	885	1291	62.29%	
	East Kent	852	-88	537	764	61.34%	
	KENT REGION	3491	-374	2177	3117	61.59%	
HOME OWNERSHIP	Sussex	280	103	417	383	42.17%	
	London	2072	240	2132	2312	49.29%	
	Kent	200	32	221	232	47.51%	
	Midlands	87	88	231	175	27.38%	
	HOME OWNERSHIP	2639	463	3061	3102	46.79%	
Common Region		17045	783	15370	17828	52.58%	

TOTAL NUMBER OF OPEN CASES: 267

Open cases by category - snapshot



% Repairs Satisfaction





The Vision

MyAccount Roadmap



- ◆ All contact online
- ◆ Better repair diagnostics
- ◆ Lease & tenancy agreement documents available online
- ◆ Gas Safety Certificates
- ◆ Fire Safety Risk Assessments
- ◆ Planned maintenance alerts
- ◆ Online ASB diaries/reporting
- ◆ Improved contact us form
- ◆ Choose and book appointments



CLICK & CONNECT

The shape of things to come.....



Ivo-nne

