

Customer Business Excellence Assessors

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investor in excellence



Customer Business Excellence Assessors

Pilot project to train customers in Business Excellence – so that they can contribute to making sure we remain competitive and customer focused

Workshop content

- SARH – our journey
- How the project came about
- What we wanted to get out of it
- How the training was structured and delivered
- What we would do different – with hindsight
- What next?

SARH

- Stock transfer Feb 2006
- AC inspection 2 years later
- 2010 – commitment to liE
- 2011 – celebrated 5th birthday – delivery of promises
- Review of governance arrangements and creation of customer scrutiny board

Why Investors in Excellence?

- Proven framework to drive improvement
- Facilitates continuous change
- Asks difficult questions
- Covers the whole business
- Flexible and adaptable
- Encompasses all other quality and regulatory standards
- Results driven
- Outcome focused
- Supports an organisation driven improvement journey



Why involve customers?

Customer empowerment

- Support co-regulation with customers through offering a range of opportunities to be involved

(TSA regulatory framework)

- Investing in empowering and growing the influence of our people (SARH – corporate objective)



Getting started

- Funding
- Partnership working with other associations
- Recruiting customers
- Agreeing objectives / outcomes

Funding

- CLG Neighbourhood Resource Centre funding
- Approach to Stafford Borough Council



Partnership working

Joint training:

SARH

and

South Staffordshire Housing



Recruiting customers

- Customer selection criteria
 - Interest in improving services
 - Good written and verbal skills
 - Commitment
 - Respect for confidentiality
- Range of previous involvement

Our customers

- Jane – member of Continuous Improvement Group
- David – customer inspectors team
- Margaret –board member

- SSHA's customers:
 - Mystery shoppers
 - Readers panel

Aim

Develop effective teams of customers to contribute to liE application / re-accreditation through having

- good understanding of the business
- practice and experience of using assessment and scrutiny techniques
- confidence to challenge in constructive way

Objectives

- provide general business assessment skills – to support scrutiny role
- Use liE as foundation for training
- Provide practical and action learning based training
- Support co-regulation and customer led scrutiny

What is in it for customers?

- Understand Excellence and how it relates to SARH
- Develop skills to assess strengths and areas for improvement
- Equipped to deliver feedback
- Role in assessing and developing priorities for improvement



Training programme

- Customers involved in agreeing outline and content
- Action learning based programme
- Staff involvement – meaningful but not imposing

What makes a good customer assessor?

- Communication skills
- Confidence
- Open mind – look for evidence
- Realistic
- Non confrontational
- Knowledge of organisation / services

Course outline

- Intro workshop (half day)
- Customer assessor training (full day)
- Coaching and support (half day)
- Feedback thoughts and findings (half day)

What does excellence mean?

- What makes an excellent housing provider?
- The liE Standard and the 9 principles
- How standards link to excellence and continuous improvement

Assessments


- planning and prepare including how and where to look for information
- questioning
- Reviewing documents
- Going on site and structuring questions and question styles
- Listening skills
- Note taking
- Providing feedback – in constructive way eg phrases such as ‘areas for improvement’ rather than ‘weaknesses’

Did exercises to practice what learnt.

Training material

Workbook issued to each customer

9 sections – as per liE assessment




Assessment Workbook

Assessor:

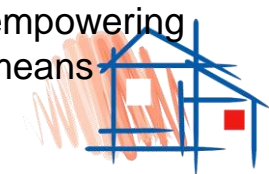
Organisation Assessed:

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Workbook

Leadership	First impressions	Evidence & observations		
Question	View	Documents / evidence	Findings	Strengths / opportunities for improvement
What is the purpose of the organisation?	Provide housing services	Website	Website: We provide homes and services for tenants	Clear and easy to understand
What is the ambition / goals?	Deliver homes, communities & neighbourhoods where people can prosper	Annual report & corporate plan	Plan to deliver more services to support communities	Goal has been made clear to tenants
What are the values	Don't know	Poster in reception	Communication, approachable, respect, empowering, supportive	Not clear what empowering means



Homework

Carry out an assessment working as team

- Decide which area to look at eg Leadership
- Agree questions
- Decide how to collect evidence
- Write findings up
- Present findings

SARH customer team

- Looked at leadership
- Interviewed Chief Executive
- Prepared list of challenging questions
- Agreed who was going to ask questions and who take notes
- Feedback to group and to SARH's Continuous Improvement Group
- Follow up work – interviewed middle managers and front line staff – to collect evidence to support initial findings

What went well

- Customers actively engaged & enthusiastic
- Worked well together – shared information about the 2 organisations
- Positive feedback from staff interviewed
- Experience and feedback helped us prepare for liE assessment

Customer feedback

“enabled us to use our initiative – worked as a group to solve problems”

“gave me confidence – brought back skills used previously but had been dormant”

“made me think – understanding how to be an assessor and how other people perceive me”

“took me deeper into areas and more involved than I had been previously”

SARH / SSHA feedback

“involved customers from the 2 organisations worked together and gained confidence to make an effective contribution to our excellence journey”

“seeing the results of the training was particularly inspiring – strengths and areas for improvement that customers came up with from working together as a team really demonstrated how we can utilise and enhance skills that customers already possess”

What would we do different?

- Prepare customers better beforehand
- Full day session too long
- Reduce the workbook – focus on first impressions – but retain the questions used
- Booking sessions and finding time in between to do homework difficult – big commitment