

**HABINTEG HOUSING  
ASSOCIATION (ULSTER) LTD**

**HOUSING**

**MYSTERY SHOPPING**

**REPORT**

**APRIL 2013**



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## 1.0 BACKGROUND

- 1.1 Mystery Shopping is a tool traditionally used by companies to measure the quality of their service from a customer perspective and to progress service improvements. This model of research has previously been adopted by Local Authorities and Housing Associations throughout England, Scotland and Wales and is recognised as an effective method of evaluating the provision of housing services.
- 1.2 Supporting Communities NI has been facilitating an annual programme of Mystery Shopping for the Northern Ireland Housing Executive and Housing Association for the past number of years. SCNI have carried out a number of Mystery Shopping exercises on behalf Habinteg Housing Association (Ulster) Ltd since 2010.
- 1.3 The purpose of Mystery Shopping is to examine how organisational policies and procedures are translated into actual customer service provision. In other words it focuses on the customer's experience of Housing Management. Mystery Shopping is not used to 'catch people out'; queries are not obscure or complicated. The scenarios used relate to everyday issues and Mystery Shoppers are objective in their approach.
- 1.4 The results provide an opportunity for Habinteg Housing Association (Ulster) Ltd to view themselves as their customers do. The analysis provides the Association with an opportunity to consider any requirements for overall organisational improvements.

Mystery Shopping is a powerful way to assess service standards and complements other research methods utilised by the Association.

## 2.0 METHODOLOGY

Supporting Communities NI undertook management of the project.

### 2.1 AREAS OF SERVICE

A number of key service areas were examined by Mystery Shopping, these were:

- Finance
- House Sales
- Development
- Anti-Social Behaviour
- Complaints
- Human Resources
- Maintenance
- Rent

In addition, Mystery Shoppers made observations on:

- Response to Letters
- Website
- Visits to Habinteg Schemes
- Telephone Service

The project also included a survey of:

- Maintenance – actual repairs
- Commencement of Tenancy visits

### 2.2 SCENARIOS

In order to gain the maximum effect of the exercise, possible scenarios were drawn from everyday issues and set the scene for the Mystery Shopper to enact. The scenarios were proofed to test they were practical, straightforward, relevant, credible and objective.

Habinteg Housing Association (Ulster) Ltd highlighted the most appropriate desired outcome for each scenario. Scoring and reporting templates used ensured that a consistent approach was taken and that the process was as user friendly as possible.

## **2.3 FRAMEWORK FOR MYSTERY SHOPPING**

The framework used for the Mystery Shopping exercise took account of SCNI experience in managing similar projects.

- 8 Areas of Service were subject to a number of telephone calls.
- 2 Letters were sent to Habinteg Offices regarding Housing
- Habinteg's Website was subject to 5 observations
- 10 survey calls were made regarding the commencement of tenancy service
- 7 survey calls were made regarding the repair service
- A total of 19 observations were made of the Telephone Service.
- 8 visits were made to Community Assistant Schemes
- Mystery Shopping was conducted between January- March 2013
- Habinteg Housing Association (Ulster) Ltd staff team was informed of the intent to conduct Mystery Shopping but not of the actual timeframe for the exercise.
- Reporting templates used by the Mystery Shoppers included a checklist of potential outcomes.
- The service experience was scored using a range of Poor, Fair, Good or Excellent.
- Mystery Shoppers were advised to make reference to the names of individual members of staff on the reporting forms.
- Participants were asked to only make comments when they supported the score awarded.

## **2.4 SELECTION OF MYSTERY SHOPPERS**

Habinteg Housing Association (Ulster) Ltd agreed to have the exercise carried out by SCNI staff and tenant representatives from their Tenant Board. The Tenant representatives received training through joint workshops facilitated by SCNI and Habinteg staff. As parts of the process Mystery Shoppers were required to adhere to confidentiality at all times and take a balanced and objective view of service provision.

## **2.5 MYSTERY SHOPPING WORKSHOPS**

In preparation for the commencement of the exercise, Mystery Shoppers attended individual one to one workshops where their roles and responsibilities were explained.

During the workshop, each Mystery Shopper was provided with a information pack including a tailored work programme, tips on carrying out the exercise and information surrounding confidentiality.

Mystery Shoppers were encouraged to contact SCNI during the exercise with any queries or concerns they may have experienced.

## 3.0 EXECUTIVE SUMMARY

3.1 This report provides an overview of the findings from the Mystery Shopping exercise.

3.1.1 In relation to **Finance**, 100% of the service was considered to be Good.

There were no instances where the service was deemed to be Excellent, Fair or Poor.

It should be noted that the Mystery Shopper had to ring back twice before speaking to the staff member as they were advised that they would have to speak to the Manager.

3.1.2 In relation to **House Sales**, 50% of the service was judged to be Excellent and 50% Good.

This service area continues to be of a high standard and was previously judged as 100% Excellent in the previous exercise (2011).

3.1.3 In terms of **Development**, 100% of the service was judged to be Excellent.

Mystery Shoppers reported that the staff member was very helpful and gave a lot of additional information and advice.

3.1.4 In terms of **Complaints**, 17% of the service was deemed Excellent, 67% Good and 16% Fair.

It should be noted that the scores varied between the North West and Hollywood offices. If the Calls had been analysed separately, the calls made to the North West Office would have shown 67% Good and 33% Excellent and the calls made to the Hollywood Office would have amounted to 67% Good and 33% Fair.

3.1.5 In relation to **Human Resources**, 100% of the service was judged as Excellent.

This represents a significant increase in service from 2011, when the service was judged as 100% Poor.

It should be noted that it took the Mystery Shopper three attempts to speak to someone in Human Resources as they were advised twice to ring back as a staff member was unavailable to speak to them.

- 3.1.6 In relation to **Planned Maintenance**, 100% of the service was judged as Excellent.

There were no instances where this service was judged as Good, Fair or Poor.

- 3.1.7 In relation to **Rent**, 50% of the service was deemed as Excellent and 50% as Good.

In comparison to the scores in 2011, there has been some improvements noted, as the previous scores indicated a 50% Excellent, 25% Good and 25% Poor rating.

Additionally, it should be recognised that all Mystery Shoppers commented on how helpful and sympathetic staff were when dealing with this scenario.

Furthermore, it should be noted that when scored separately, the Hollywood Office scores were 100% Excellent, whilst the North west Office scored 100% Good.

- 3.1.8 In relation to the response from **letters** by Habinteg Staff, 100% of the service was judged as Good.

It was noted by Mystery Shoppers that their letters were responded to very promptly and that they received an information pack.

- 3.1.9 In terms of **Website Observations**, 100% of this service was deemed as Good.

Mystery Shoppers commented on how easy it was to navigate through the website and that it was attractive. It was suggested that photographs of staff on contact page could be posted so that users could note who they would be contacting.

- 3.1.10 In relation to **Visits to Schemes**, 34% was scored as excellent, 22% Fair and 44% Poor.

The responses provided by Mystery Shoppers proved to be 'mixed' when reporting on this service. Some Mystery Shoppers commented on the 'extra information' provided by staff and how staff members were 'very helpful, courteous and professional'. Other Mystery Shoppers noted that they could not access the schemes as the Community Assistant was not there, which conflicted with the information highlighted on their office windows.

- 3.1.11 In relation to the survey of **Repairs**, 25% of the service was judged as Excellent, 50% as Good and 25% as Fair.

It should be noted that not all contact numbers were accurate so the calls could not be made.

3.1.12 In terms of the survey of **Commencement of Tenancies**, 38% of the service was scored as Excellent, 50% as Good and 12% as Fair.

Mystery Shoppers commented that in some instances, the tenant could not remember all the details and had to be prompted in order to complete the exercise.

3.1.13 Across **All Service Areas**, 27% of the service was judged as Excellent, 53% as Good, 11% as Fair and 9% as Poor.

3.1.14 In relation to observations made to the **Telephone Service**, 100% of calls were answered promptly and the person answering the calls identified the Association in 100% of the cases, however, it should be noted that in some instances Mystery Shopper commented that they had to call back a few times before getting through to the right staff member.

## 4.0 FINDINGS

### 4.1 SUMMARY FINDINGS

4.1.1 From the exercises completed the summary results in terms of Poor, Fair, Good or Excellent were as follows:

*\*Red represents the highest scores*

	POOR	FAIR	GOOD	EXCELLENT
FINANCE	-	-	100%	-
HOUSE SALES	-	-	50%	50%
DEVELOPMENT	-	-	-	100%
ANTI-SOCIAL BEHAVIOUR	-	-	50%	50%
COMPLAINTS	-	16%	67%	17%
HUMAN RESOURCES	-	-	-	100%
PLANNED MAINTENANCE	-	-	-	100%
RENT	-	-	50%	50%
LETTERS	-	-	100%	-
WEBSITE	-	-	100%	-
VISITS TO SCHEMES	44%	22%	-	34%
REPAIR SURVEY	-	25%	50%	25%
COT SURVEY	-	12%	50%	38%
ALL SERVICE AREAS	9%	11%	53%	27%

4.1.2 For comparative purposes, the table below displays results from the 2011 Mystery Shopping Exercise

2011 Results	POOR	FAIR	GOOD	EXCELLENT	N/A
FINANCE	-	-	-	100%	-
DEVELOPMENT	-	-	100%	-	-
HUMAN RESOURCES	100%	-	-	-	-
COMPLAINTS	-	25%	25%	50%	-
ANTI-SOCIAL BEHAVIOUR	-	-	-	100%	-
HOUSE SALES	-	-	-	100%	-
RENT	25%	-	25%	50%	-
LETTERS	-	-	-	100%	-
WEBSITE	-	-	-	100%	-
VISIT TO HABINTEG OFFICES	-	25%	25%	50%	-
VISIT TO SCHEMES	25%	12.5%	25%	37.5%	-
REPAIRS SURVEY	-	14%	43%	43%	-
COT SURVEY	-	33.3%	-	33%	33.3%
ALL SERVICE AREAS	11%	13%	21%	55%	

4.1.3 In relation to the telephony service the following summarises the findings:

	Yes	No
Calls answered promptly	100%	-
Person answering phone identified the Association	100%	-
Where the call was transferred, it was transferred to the correct person	93%	7%
Where the call was transferred it was answered promptly	85%	15%
Where the call was transferred the person answering gave their name and department	89%	11%

## 4.2 OVERALL RESULTS

4.2.1 From the exercises completed the following highlights the results per telephone call or visit:

	Call 1	Call 2	Call 3	Call 4	Call 5	Call 6	Call 7	Call 8	
FINANCE	Good	-	-	-	-	-	-		
HOUSE SALES	Excellent	Good	-	-	-	-	-		
DEVELOPMENT	Excellent	-	-	-	-	-	-		
ASB	Excellent	Good	-	-	-	-	-		
COMPLAINTS	Good	Good	Fair	Excellent	Good	Good	-	-	
HUMAN RESOURCES	Excellent	-	-	-	-	-	-		
PLANNED MAINTENANCE	Excellent	-	-	-	-	-	-		
RENT	Excellent	Excellent	Good	Good	-	-	-	-	
	<b>Letter 1</b>	<b>Letter 2</b>							
LETTERS	Good	Good	-	-	-	-	-	-	
	Observ 1	Observ 2	Observ 3	Observ 4	Observ 5	Observ 6	-	-	
WEBSITE	Good	Good	Good	Good	Good	Good			
	<b>Visit 1</b>	<b>Visit 2</b>	<b>Visit 3</b>	<b>Visit 4</b>	<b>Visit 5</b>	<b>Visit 6</b>	<b>Visit 7</b>	<b>Visit 8</b>	<b>Visit 9</b>
SCHEME VISITS	Fair	Good	Poor	Good	Good	Fair	Poor	Poor	Poor
	<b>Call 1</b>	<b>Call 2</b>	<b>Call 3</b>	<b>Call 4</b>	-	-	-	-	
REPAIR SURVEY	Good	Good	Fair	Excellent	-	-	-	-	
	<b>Call 1</b>	<b>Call 2</b>	<b>Call 3</b>	<b>Call 4</b>	<b>Call 5</b>	<b>Call 6</b>	<b>Call 7</b>	<b>Call 8</b>	
COT CALLS	Excellent	Good	Fair	Good	Good	Excellent	Good	Excellent	

### 4.3 ANALYSIS OF FINDINGS

4.3.1 Following analysis, the following services yielded the highest satisfaction, scoring 100%;

- Development
- Planned Maintenance
- Human Resources

This was followed by;

- Finance (100% Good)
- Letters (100% Good)
- House Sales (50% Excellent and 50% Good)
- Complaints (50% Excellent and 50% Good)
- Rent (50% Excellent and 50% Good)

4.3.2 The service area that yielded the least satisfaction were **Scheme Visits**, with 44% of the service judged as Poor. It should be noted that this was due to Mystery Shoppers not being able to get access into the Schemes.

4.3.3 Across all service areas, 27% of the scores were identified as Excellent, 53% as Good, 11% as Fair and 9% as Poor.

4.3.4 There was found to be a high standard of service provided in relation to the telephony system.

## 5.0 PARTICIPANT FEEDBACK

The Mystery Shoppers were invited to reflect on the process and experience of Mystery Shopping:

### 5.1 TAKING PART IN MYSTERY SHOPPING

The Mystery Shoppers were asked to highlight:

- Their Observations
- What they most liked about the exercise
- What they least liked about the exercise
- Any lessons learnt
- Any other comments

#### 5.1.1 Observations made by Mystery Shoppers

- Very Professional Staff
- Website- very easy to navigate
- Repairs surveys- numbers not always correct
- Good knowledgeable staff members

#### 5.1.2 What the Mystery Shoppers Most liked

- The overall exercise
- Information and support provided by Habinteg and SCNI Staff
- The professionalism and warmth of staff

#### 5.1.3 What the Mystery Shoppers Least Liked

- Waiting to be transferred
- Repairs survey- found difficulties when making the calls to tenants and they felt that they were 'suspicious' of them

#### 5.1.4 What the Mystery Shoppers Learnt

- The overall service provided by Habinteg
- Putting themselves in other peoples/tenants shoes
- Mystery Shopping

#### 5.1.5 Any other comments

- Pleasurable Experience
- Thoroughly enjoyed it
- Looking forward to participating again
- Staff were overall very nice and sympathetic

## 6.0 CONCLUSION

- 6.1 Mystery Shoppers have examined how organisational policies are translated into customer service. Mystery Shopping has proven to be a cost effective method of gauging satisfaction with service provision.
- 6.2 In general terms the findings have been positive and have shown a significant increase in service standards in light of the feedback received from the 2011 exercise. It was noted that the telephone service showed a 100% score for promptness in answering calls.

It can be seen from the results that the visits to schemes still remains to be one of the lowest recorded services and this seems to be due to staff not being in the scheme when the Mystery Shoppers visit. It is suggested that in instances where the Community Assistant is not available/on holidays or are sick that some form of information is posted at the scheme to let potential visitors know.

Additionally, in the previous report it highlighted the difference in service between the Holywood and North West Office, with the North West receiving higher scores. This has now levelled up, with both offices providing the same consistent high service.

Furthermore, across most of the service areas, Mystery Shoppers commented on the professionalism and friendliness of staff and how staff were willing to provide additional information and support.

- 6.3 It is imperative that the exercise is not considered complete when the results are published rather the exercise should be considered to be part of an ongoing cycle of service improvements. An improvement plan should be developed to ensure that areas of concern are addressed.

Specific areas of concern could be addressed by introducing 'model answers' as part of staff training and by encouraging 'Managers' to provide a range of scenarios. This would provide staff with general subject areas and key questions/answers related to the service area.

It would also be useful to engage with Community Assistants to ensure that the appropriate methods of communication are utilised to inform the wider community and visitors should they not be available within the scheme.

- 6.4 In terms of future possibilities there is significant scope to extend and enhance Mystery Shopping in Habinteg Housing Association (Ulster) Ltd.

The value of the exercise could be enhanced by conducting Mystery Shopping on a rolling programme. Rather than focussing on a particular time of the year the service areas could be examined across the year. This would enable an increased sample size to be examined.

There is also an opportunity to further extend the scope of the exercise to consider other areas of service delivery such as:

- Transfer/Exchange
- Equality – Race Relations/Disability
- Tenant Participation

Additionally, the use of tenants in the exercise has proved an invaluable resource and should be utilised as fully as possible in future Mystery Shopping exercises. In doing so, Habinteg should continue to promote this opportunity to their tenants.

## **APPENDIX 1**

### **INDIVIDUAL CALL REPORTS**

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