Salix Homes
Customer Voice

Scrutiny Report

Customer Communications Relating to Investment Works

November 2025

1. Introduction

1.1 As part of the agreed programme of scrutiny pieces for 2025/26, the Customer Support scrutiny was postponed following unexpected internal challenges after this work had started.

1.2 Due to an increasing amount of customer dissatisfaction and complaints about customer communication about the sprinkler installation programme in some of our high rise blocks, the scrutiny panel agreed to scrutinise customer communications in investment works instead.

1.3 A new scope was proposed and agreed by the Customer Committee as follows:

Subject	**Customer Communication relating to investment works** • How well do we communicate with customers regarding planned investment works? • Do those customer communications cater for a wide range of diverse customer needs? • How well do we collaborate between technical and nontechnical teams to ensure customers are aware of the work, its duration, impact etc? • How well do we communicate the mandatory/non mandatory nature of the works?
Commissioned by	Customer Committee.
Panel	Already in place, comprising five Scrutineers from the Scrutiny Pool.
Aims /objectives/outcomes	The purpose of this review is to: • Understand and scrutinise the effectiveness of customer communication before, during and after investment works. • Understand the customer experience of communications during investment works. • Identify where any improvements could be made to the way in which we communicate about timeframes, the mandatory/non mandatory of the work, where there may be dissent or dissatisfaction. • Understand where poor communication leads to complaints, if tracked and any lessons learned.
Areas out of scope	More general customer communications, not relating to planned investment works.
Key service area involvement	Customers and Communities Directorate.
Links to corporate plan	Ensure a strong and influential customer voice through our customer engagement arrangements.

2. Methodology

2.1 The methodology for the scrutiny was agreed with the scrutineers and tasks/activities allocated according to skills, preference and scrutineer/colleague availability. The agreed tasks were:

- Initial background presentation and interview of the Asset and Investment Manager
- Desktop review of policy documents and associated letters, satisfaction survey and other written communications
- Website review focussing on any investment information
- CRM process and shadowing
- Complaints data review
- Review of satisfaction data relating to investment works
- Relevant employee interviews
- Review of other Registered Providers' investment communications through a website review

2.2 Colleagues who contributed their time, either by being interviewed/shadowed or by providing evidence were:

- Craig Graham, Asset and Investment Manager
- Lee Sandham, Asset Data Manager
- Tsz Wan Yui, Asset Data Officer
- Declan Davis, Internal Tenant Liaison Officer
- Laura Derbyshire, Senior Housing Officer
- Sasha Harris, Customer Service Officer
- Laura Flint, Complaints Manager
- Garry Holt, Tenant Liaison Officer at Emmanuel Whittaker
- Sam Foster, Customer Communications Manager

3. Findings

3.1 The scrutiny panel identified that there is a commitment to providing good quality, accessible communications to Salix Homes' customers and that this commitment would be strengthened by more collaborative working across teams and better use of available systems that would enable communications to be tailored, timely and allow more time for associated issues to be more proactively addressed.

3.2 The scrutiny panel concluded that better internal communication would inevitably lead to better communication with external customers if employees were better informed about planned and ongoing investment works so they can provide accurate information when required.

3.3 It was clear to the panel that, in most cases, gaps had already been identified and that plans were in place to address these. These gaps had been particularly highlighted by the recent issues with the sprinkler installation programme, and the Asset and Investment Manager was very transparent with the scrutiny panel about lessons that have been learned through that process.

Presentation to Scrutiny Panel

3.4 All scrutineers attended the background presentation by the Asset and Investment Manager which resulted in a significant Q&A session - which informed and helped shape the scrutiny panel's scrutiny activities.

3.5 Example letters, surveys and other communications were shown as part of the presentation and further scrutinised as part of the desktop review.

3.6 The presentation slides are at **Appendix 1**.

Desktop Review

3.7 The desktop review covered the following:

- Customer Feedback Form
- Email to relevant employees – advising and circulating letters sent to customers
- Knowing Our Customers document
- Stock Condition – Letter One, Letter Two and Final Contact Letter
- Customer Refusal of Improvement Works Form
- Template for access letter – 1st Reminder, 2nd Reminder and 3rd Reminder
- Sprinkler Start Letter – Riverbank Towers
- Sprinkler Brochure – Riverbank Towers
- Corporate Plan

3.8 There is a detailed review of these communications at Appendix 2.

Conclusion of Desktop Review

3.9 Better and regular collaboration with the Communications Team and a review of written communications in line with our approaches to supporting vulnerable customers in particular, would ensure that all written communications, including those sent out by sub-contractors, are good quality, up to date, compliant and with the right tone and language.

3.10 The 'thread' from the Corporate Plan outcomes to the work of the Investment Team and its need to communicate with customers about relatively complex matters is clear. By working more collaboratively with internal teams e.g. Communications, Housing, and Customer Services, delivery of those messages will be more consistent, producing a better customer experience and a reduction in complaints and customer dissatisfaction.

3.11 This links to **Recommendations 1, 5, 8 and 11**.

Salix Homes' website review

3.12 One scrutineer undertook the website review in relation to investment information, and their comments have been discussed with the Asset and Investment Manager and Customer Communications Manager found at Appendix 3.

Conclusion of website review

3.13 The website is not a good source of information for customers about whether/when investment works will take place. There is no programme of planned works and no obvious place for customers to read about work that may take place in future, or to use the website to get in touch with any queries.

3.14 Consideration should also be given to an app that could provide more of this information or whether the existing MySalix portal could extend to providing this by means of self-service.

3.15 This links to **Recommendations 3, 6 and 7**.

Interview with Asset and Investment Manager

3.16 The Asset and Investment Manager was interviewed on MS Teams. The report outlining questions asked and responses can be found at Appendix 4.

Conclusion of Asset and Investment Manager interview

3.17 Processes around customer communications relating to investment work are somewhat fragmented and would benefit from being more regularly and thoroughly planned and reviewed in conjunction with other relevant teams.

3.18 This links to **Recommendations 1, 4, 5 and 11**.

Interview with contractor TLO

3.19 A contractor TLO was interviewed on MS Teams. The report outlining the questions posed and answers provided is at Appendix 5.

Conclusion of contractor TLO interview

3.20 The interface between the contractor TLO and customers is good, and they are a positive conduit for information sharing to ensure that the customer experience is good. Improvements could be made by ensuring that all customer information provided, as held in our CRM system, is as up to date as possible and by ensuring access to the same translation services that are used by Salix Homes.

3.21 The satisfaction process relating to contractors was identified as unreliable - referred to as the contractors ‘marking their own homework’ and not sufficiently robust - with the scrutiny panel concluding that the process should be led/owned by Salix Homes and more thorough.

3.22 This relates to **Recommendations 10 and 11**.

Interview with Asset Data Manager

3.23 The Asset Data Manager was interviewed in person at Diamond House. The report outlining their discussions is at Appendix 6.

Conclusion of Asset Data Manager interview

3.24 The current asset management system, Keystone, is soon to be replaced by an alternative. This system also has limited integration with CRM, although having been identified as a weakness in our process, plans are in place for appropriate Application Programming Interfaces (APIs) to be utilised that will improve the interface.

3.25 These two systems 'talking to one another' was viewed as key by the scrutiny panel to improving internal communications, leading to better customer communications through reliable systems integration.

3.26 The introduction of another system when CRM is not being fully optimised was called into question (leading to **Recommendation 10),** and a response has been provided by the Investment Team. This will be further considered by the scrutiny panel.

3.27 This also relates to **Recommendations 1, 2, 9 and 11**.

Interview with Senior Housing Officer

3.28 A Senior Housing Officer was interviewed by MS Teams. The questions and responses are at Appendix 7.

Conclusion of Senior Housing Officer interview

3.29 As already described, internal communication between the Investment Team and other teams is somewhat limited and could be improved by various forms of communication e.g. bulletins, shared workspace containing relevant updates and regular meetings.

3.30 More relevant information could also be added to CRM to ensure all teams are able to provide consistent information relating to investment works.

3.31 This relates to **Recommendations 1 and 9**.

Interview with Customer Liaison Officer (CLO)

3.32 The internal Customer Liaison Officer was interviewed on MS Teams. A summary of the discussions, provided in writing after the interview by the CLO, is at Appendix 8.

Conclusion of CLO interview

3.33 More forward planning and collaborative working could result in a more seamless service provided by the CLO, perhaps involving the administrative function in the team for certain tasks such as sending letters or undertaking the satisfaction gathering process.

3.34 This is also where the exploration of an app was suggested, to relieve pressure on the CLO function and to enable more customers to self-serve regarding investment works. As at para. 3.6, more use of the website for information sharing and a way of providing feedback would also improve customer choice as to how they are communicated with when investment works are taking place.

3.35 This relates to **Recommendations 6, 7, 8 and 11**.

Interview with Customer Service Officer (CSO)

3.36 A Customer Service Officer was interviewed by MS Teams. A summary of the questions and responses is at Appendix 9.

Conclusion of CSO interview

3.37 As already concluded, more comprehensive and regular updates from the Investment Team would help to ensure that CSOs are able to provide information to customers when they require it, and more interface with CRM for flags. In addition, consideration should be given to the administrative function in the Investment Team being available to take calls relating to investment works.

3.38 This relates to **Recommendations 1 and 9.**

Interview with Customer Communications Manager (CCM)

3.39 The Customer Communications Manager was interviewed by MS Teams. A summary of the discussions and responses is at Appendix 10.

Conclusion of CCM interview

3.40 Again, as already concluded, more regular, reliable and timely information exchange between the Communications and Investment teams would ensure that Salix Homes is able to 'get ahead' of upcoming works, consider what tailored communications will be required and ensure they are in place, giving proper consideration to the needs of the widest range of customers and their communication preferences. In addition, possible new ways of communicating could be explored such as the use of social media, text messaging or an app.

3.41 This relates to **Recommendations 1, 2, 5, 7, 8 and 11.**

Complaints Data

3.42 The data set and analysis provided by the Complaints Manager indicates that there is no trend towards dissatisfaction with the Investment Team and they don't receive an exponentially high number of complaints, either about communication or any other aspect of the service.

3.43 It was suggested though, that improvements could be made to the process of receiving complaints that appear to be about a repair for example, which in fact relate to improvement works carried out at the property. As this is difficult to show in the CRM system, a recommendation was made to ensure that the Complaints Team thoroughly checks the origin of a repairs-related complaint for links to any works carried out at the property within the previous 12 months.

3.44 This relates to **Recommendation 2**.

Satisfaction Data

3.45 The Asset Data Manager provided data relating to satisfaction with investment works carried out, which included verbatim comments from customers and overall satisfaction, plus a series of sub questions aimed at understanding satisfaction with different elements of the work.

3.46 Whilst this data appears to indicate customer satisfaction, it did lead the panel to question how robust and reliable the satisfaction process is, as mentioned at 3.8, due to contractors undertaking this process themselves. They are somewhat incentivised for this feedback to be overwhelmingly positive, and the panel concluded that the satisfaction process should be owned and managed by the Investment Team, thereby providing more confidence that satisfaction levels are genuinely high. They also concluded that better indications of satisfaction/dissatisfaction are sought during the works, possibly via a quick 'smiley face' survey or similar, sent by SMS, which would mean that potential complaints and/or overall dissatisfaction are addressed more quickly and not after the fact.

4. Recommendations

4.1 Following the review of communication in investments, the following recommendations were proposed by the Scrutiny Panel, as agreed by service managers;

Recommendation number	Recommendation details
1	Establish clearer lines of communication on an ongoing basis between Investment and other teams (Housing, CSC, Communications, Repairs and Building Safety specifically), via monthly meetings and regular updates on either existing or upcoming works to ensure customers receive timely, sufficient and effective levels of communication throughout. Also consider a shared electronic workspace for better collaboration.
2	Complaints Team to verify whether a repair complaint is linked to previous investment works when categorising the complaint to identify any patterns.
3	Produce an annual calendar of proposed investment works for the intranet and website for better visibility and transparency.
4	Develop standard templates for letters, emails, and postcards to ensure consistency and efficiency, tailored to each piece of work. Supply contractors with jointly branded communication packs and regularly check compliance of their use.
5	Explore the use of a communication app/tool to provide effective real time communication for customers to interact.
6	Review website to increase details of investment works to ensure customers receive consistent, accurate and relevant information.

7	Explore the use of social media and text messaging to complement traditional methods of communication.
8	Improve the interface between investment-specific information and CRM to ensure that information about works is more easily accessible for the wider business.
9	Assess whether purchasing a new investment system is required or whether this information can be stored in CRM.
10	Review customer satisfaction processes, considering ways of better understanding satisfaction during investment works as well as afterwards. Ensure that Salix Homes leads the process (rather than the contractor) and include robust follow-up of any dissatisfaction expressed at any point, giving consideration to where Admin/TLO resources can be best used.
11	Identify the communication preferences (and/or vulnerabilities) of customers impacted by investment works and consider tailoring communications accordingly, such as the use of pictorial guides or contractors having access to Language Line for example, giving consideration to where Admin/TLO resources can be best used.

5. Conclusion

5.1 The overall conclusion of the scrutiny panel is that, by agreeing and implementing the above recommendations, the experience of being a Salix Homes customer whilst investment work is undertaken will be significantly improved. This will also lead to a clear increase in customer satisfaction, fewer complaints and will positively contribute to key outcomes in the Corporate Plan.

Copies of Appendices are available upon request.