



Customer Journey Mapping - Independent Living

Quarter Three 2025/26
Customer Experience Team

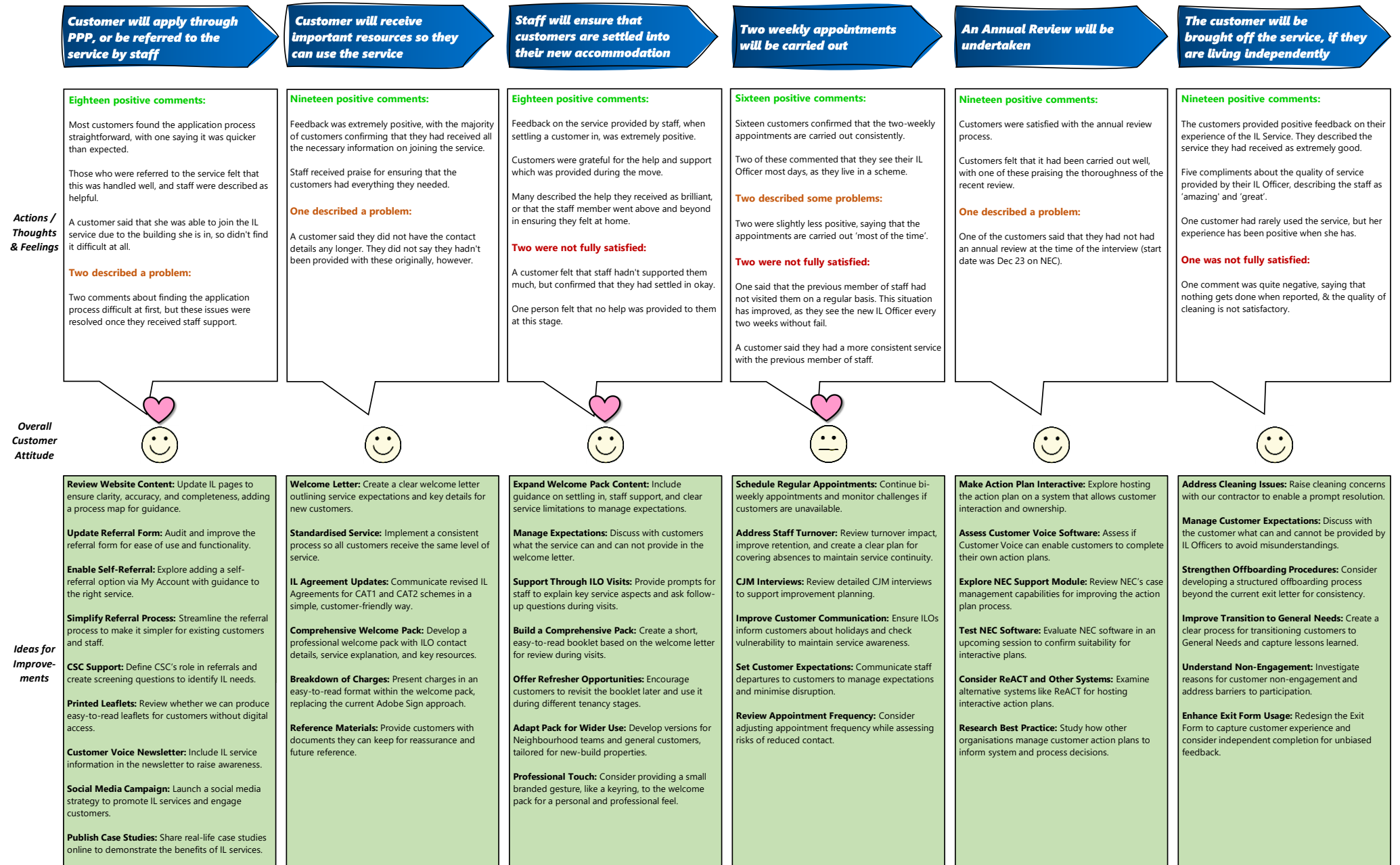
Customer Journey Mapping Results Report – Independent Living

Quarter Three 2025/26

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Customer Journey Map



Introduction & Project Outline

A Customer Journey Mapping exercise is focussed on the thoughts and feelings of the participants, to understand the customer experience of a service from start to finish.

This project was commissioned to establish the perception of customers who have been supported by the Independent Living Service. From the starting point, which can be customers applying or being referred to the service, to the final stage, when a customer may be taken off the service – we want to know whether customers felt their experience was positive, and the support provided was to a high standard.

In order to do this, we broke the process down into each journey step, detailing when a customer would interact with the organisation. This would help officers to understand how customers feel about the process at each step, so we can identify any areas which could be improved upon for the benefit of all customers.

The main focus of the project was to carry out in-depth interviews with customers. Prior to this, the Customer Experience Team met with **Suzanne Meylan** (Head of Independent Living), who has responsibility for the delivery of this service. At this meeting, the benefits of the exercise were discussed, along with an outline of the work which would be involved.

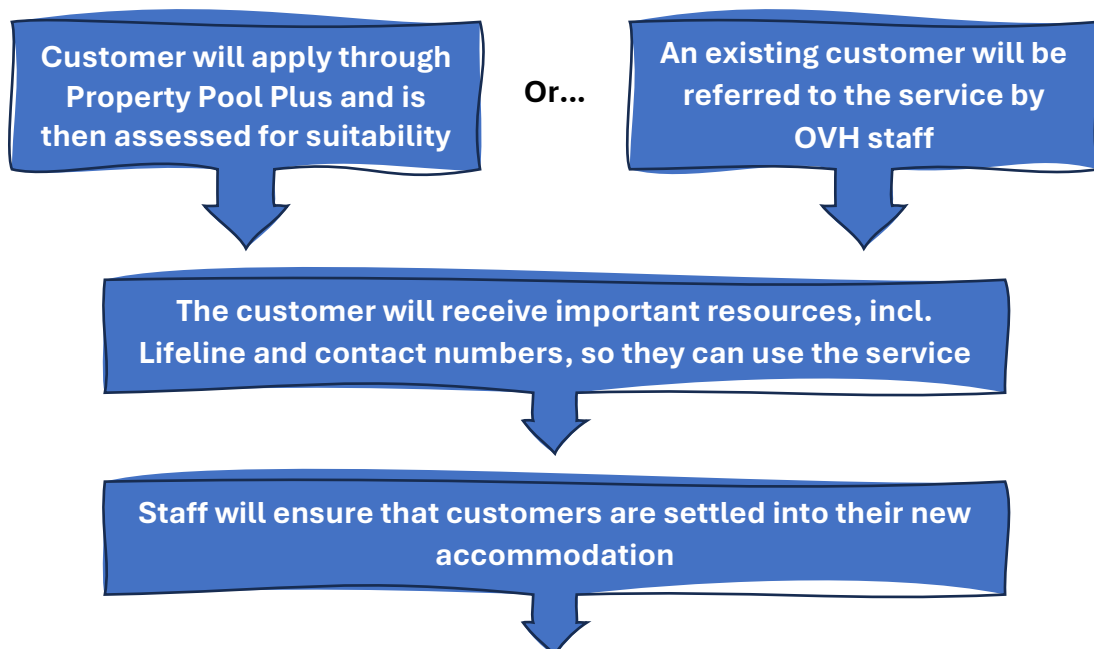
During the meeting, the following was agreed:

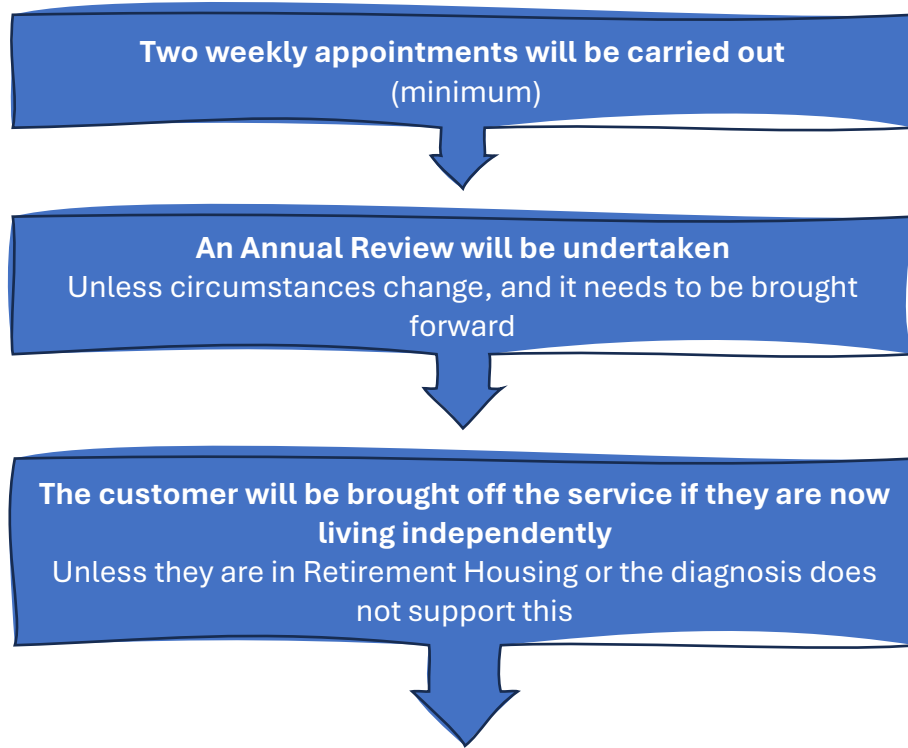
- Where the start and end point of the customer journey is.
- Which customers we will be targeting when conducting interviews.
- The members of staff would be invited to the Focus Group, following the interviews.

Please note, this project was overseen by **David Barton** (Customer Intelligence Assistant), with **Grace Lowe** (Customer Experience Apprentice). David Barton analysed the feedback, chaired the Focus Group, and produced the final report. Grace Lowe conducted the in-depth interviews with customers.

What is the Customer Journey?

During the scope meeting, it was important to establish what the customer journey actually looked like. The list of all the key journey steps/touch points which were focused on can be found below:





Customer Journey Map Terminology

Journey Steps / Main Touch Points - These are the main steps a customer takes through the process/service we are looking at, it is each interaction the customer has with the company and each interaction the company makes with the customer.

Moments of Truth - The points where a customer decides whether or not they are satisfied or dissatisfied with the service, and is the deciding point for the customer. There are usually only a few moments of truth in a journey map.

What Happened Next?

An outline of the main discussion points was written up on a prompt sheet, but the main purpose of the telephone calls was to have a conversation with the customer, to gain an understanding of their thoughts and feelings.

The customer insight gathered through the interviews was used to inform the staff who attended the Focus Group. Following this, the final Customer Journey Map was finalised.

Staff who attended the Focus Group and contributed to this project are listed below:

- Suzanne Meylan - Head of Independent Living
- Carley Lewis - Independent Living Team Leader
- Sarah Fellows - Independent Living Officer
- Danielle Harris - Customer Service Centre Manager
- Katie Chandley - Neighbourhood Services Officer
- Shanna Woolsey - Customer Experience Lead

Customer Feedback from Interviews

During Quarter 2 of 2025/26, 20 in depth interviews were undertaken with customers about their experience of the Independent Living Service at One Vision Housing. We were particularly interested in how they felt at each stage of the process, to understand the experience from a customer perspective.

The interviews are summarised below, under the key touch points, when the customer will work with OVH staff.

Customer will apply through Property Pool Plus, or be referred to the service by OVH staff

- The majority of the customers found the application process straightforward, with one saying it was quicker than expected.
- Those who were referred to the service felt that this was handled well, and staff were described as helpful.
- A customer said that she was able to join the Independent Living service due to the building she is in, so didn't find it difficult at all.
- There were two comments about initial difficulties, but these were resolved once the customer received staff support.

The customer will receive important resources, incl. Lifeline and contact numbers, so they can use the service

- Feedback for this touchpoint was extremely positive, with the majority of customers confirming that they had received all necessary information upon joining the service. This included contact numbers and Lifeline access (if applicable). Staff were praised for ensuring customers had everything they needed.
- One of the customers said that they did not have the contact details any longer, but did not say they had not been provided with these when joining the service.

Staff will ensure that customers are settled into their new accommodation

- Feedback on the service provided by staff, when settling a customer in, was overwhelmingly positive. Customers were grateful for the help and support which was provided during the move. Many described the help they received as either brilliant, or that the staff member went above and beyond in ensuring that they felt at home.
- One of the customers felt that staff didn't help them much, but they did settle in okay.
- One person said that no help was provided to them at this stage.

Two weekly appointments will be carried out

- Sixteen of the customers confirmed that two-weekly appointments are carried out consistently. Two of these commented that they see their Independent Living Officer most days, as they live in a scheme.

- Two of those who were interviewed were slightly less positive, saying that the two weekly appointments are carried out 'most of the time'.
- One said that the previous member of staff had not visited them on a regular basis. However, this situation has improved, as they see the new Independent Living Officer every two weeks without fail.
- A customer said they received a more consistent service with the previous member of staff.

An Annual Review will be undertaken

- Where applicable, customers were satisfied with the annual review process. Customers felt that it had been carried out well, with one of these praising the thoroughness of the recent review.
- One of the customers said that they had not had an annual review at the time of the interview.

The customer will be brought off the service, if they are now living independently

Although customers who had left the service were contacted, they declined to be interviewed. So, those who participated in this project were on the service at the time the interviews were carried out. Please see below for a summary of their thoughts and feelings about the service they had received.

- Eighteen of the customers provided positive feedback when reflecting on their overall experience of the Independent Living Service. They described the service they had received as extremely good, and had no complaints.
- Five of these were compliments about the quality of service provided by their Independent Living Officer, describing the staff they worked with as 'amazing, and 'great'.
- One comment was from a customer who said that she has rarely used the service, but her experience has been positive when she has.
- One negative was received with a customer saying that nothing gets done when reported, and the quality of cleaning isn't being carried out to a high standard.

Suggestions for Improvement

Sixteen of the customers felt that the service was very good, and had no improvements to suggest. Four suggestions were provided, and can be found below:

- A customer was happy with the service they receive now, but thought it was important that IL Officers should see their customers every two weeks, as she has had problems with this in the past.
- One comment was to get problems resolved when people complain, and listen to residents.
- Independent Living officers should follow up on promises, such as sorting problems out in the scheme when they say they will.
- A customer said that staff should ensure that any promises made are followed up on.

Please note, full details of each interview can be viewed on the Appendix to this report.

Full List of Recommendations

During the Staff Focus Group, recommendations were made to improve the service for customers. In order to do this, each of the journey steps were discussed in full, alongside the customer insight which had been gathered from the in-depth interviews.

This section provides a detailed overview of each idea which was suggested for this project. As with the interview summary, these recommendations and discussion points are broken down by each journey step, and can be viewed below.

Customer will apply through Property Pool Plus, or referred to the service by OVH staff

- **Review Existing Website Content:** Property Pool Plus (PPP) can be a complex application process. The Staff Focus Group recommended looking at the current Independent Living pages on the website, and ensuring that the information is understandable, and up to date. Anything that's missing or confusing should be fixed.

To provide further guidance, a process map, similar to the one on the Aids & Adaptations page, could be included.

- **Update Referral Form:** The Staff Focus Group felt there should be an audit of the existing referral form on the website to make sure it works well and is easy for tenants to use.
- **Self-Referral via My Account:** A suggestion was to see if an enhancement can be made to My Account, so customers can refer themselves this way. This could include using IL options to guide customers to the right branch or service, especially if they don't often speak to a Neighbourhood Services Officer frequently.
- **Simplify Referral Process:** Review the current referral process and develop a streamlined approach that reduces complexity for both existing customers and staff.
- **Customer Service Centre Support:** Evaluate the potential role of the Customer Service Centre (CSC) in supporting referrals. Develop a structured set of screening questions to help CSC staff identify customers who may benefit from Independent Living.
- **Leaflets for Digitally Excluded Customers:** Review whether we can design and produce printed leaflets for customers who lack digital access. If possible, ensure these materials are easy to distribute and provide essential information about IL services.
- **Customer Voice Newsletter:** Add information to the Customer Voice newsletter, to raise awareness and educate customers about the available services.
- **Social Media Campaign:** Develop and implement a social media strategy to regularly promote IL services. Schedule posts that highlight benefits and encourage engagement from customers who may qualify.
- **Publish Case Studies:** Create and publish a series of case studies on the website highlighting real-life examples of customers who have accessed the service. This could cover a range of scenarios to illustrate the value and positive impact that the service has had.

*Please note, as this was the first touch point, and an important part of the customer journey, it was selected as the first **Moment of Truth**.*

The customer will receive important resources, incl. Lifeline and contact numbers, so they can use the service

- **Welcome Letter:** Create a clear and informative welcome letter for new customers. This should outline what they can expect from the service and provide essential details to avoid confusion.
- **Ensure a Standardised Service:** Continue to work on a standardised process so all customers receive the same level of service. This is already being progressed by the IL Team, following a Scrutiny review.
- **Confirm IL Agreement Updates:** Ensure the revised IL Agreement for CAT1 and CAT2 schemes are communicated clearly and easy for customers to understand.
- **Develop a Comprehensive Welcome Pack:** This would be a longer term project, and would involve designing a glossy, professional looking welcome pack for new customers that includes the following:
 - The name and contact details of their Independent Living Officer (ILO).
 - Signposting to key information and resources.
 - A full explanation of the service so customers know what to expect.
- **Clear Breakdown of Charges:** As part of the welcome pack, it would be beneficial to present charges in a simple, easy-to-read format. This should replace the current Adobe Sign approach with something more customer friendly.
- **Provide Reference Materials:** The Staff Focus Group also recommended offering documents to customers that they can keep, and refer to later. This would help them remember key details, and would provide reassurance about the service.

Staff will ensure that customers are settled into their new accommodation

- **Expand Welcome Pack Content:** The Welcome Pack should include guidance on settling into a new home and what customers can expect from staff during this period of transition. This document would clearly explain our commitment to them, and provide key details on what is not possible to reduce confusion.
- **Manage Expectations:** Ensure the welcome letter clearly explains what the service will and will not provide. This helps set realistic expectations from the start, and will help the Independent Living Officers to explain to customers what they can and cannot do.
- **Support Through ILO Visits:** Provide prompts for IL staff to highlight key aspects of the service, and to ask follow-up questions during visits. Suzanne Meylan would supply guidance for this.
- **Build a Comprehensive Pack:** Use the welcome letter as the foundation, then add simple, easy-to-read details in a short booklet. IL staff can review this with customers during visits.
- **Offer Refresher Opportunities:** Staff could encourage customers to revisit the booklet at later stages if they forget details. It could also be used to cover key information at different points of the tenancy.

- **Adapt the Comprehensive Pack for Wider Use:** Share the Welcome Pack with other teams, who can then choose to adapt it for other areas of the business, such as Neighbourhood Services. Personalised packs for new-build properties adopt a similar approach so it feels tailored to the customer.
- **Professional Touch:** Consider including a small gesture to customers when they move in, such as a branded keyring with the welcome pack. This looks professional and adds a personal feel.

*As customers valued the help and support provided at this stage, this was selected as the second **Moment of Truth**.*

Two weekly appointments will be carried out

- **Schedule Regular Appointments:** Continue with two weekly appointments as planned. Monitor any challenges that arise if customers are unavailable.
- **Address Staff Turnover:** Staff turnover has been high, with team members leaving recently. Review the impact on service delivery and consider measures to improve retention. Also, create a clear plan for covering absences due to sickness or staff leaving the business. This will ensure continuity of service for customers.
- **Provide Addresses for Review:** David Barton to supply the details from the Customer Journey Mapping interviews for review, to support with planning of improvement measures.
- **Improve Customer Communication:** ILOs should inform customers if they are going on holiday and check if customers are vulnerable. This ensures customers are aware of any changes in service.
- **Set Customer Expectations:** If an ILO is leaving, the Staff Focus Group suggested communicating this fact to customers, so they understand there may be some disruption to service.
- **Review Appointment Frequency:** There was some discussion about moving appointments to every three to four weeks, where appropriate. However, this may not be practical, and could present a risk as any missed appointments could increase the time customers go without contact.

*As customers valued the personal contact at this stage, this was selected as the first **Moment of Truth**.*

An Annual Review will be undertaken

- **Make the Action Plan Interactive:** Explore options to make the action plan more interactive. Currently, the plan is stored on our repair management system, OneServe, which does not allow customers to interact with it. The Staff Focus Group recommended looking into whether the Action Plan could be hosted on a different system. Also, the action plan should feel like it belongs to the customer. If it is not interactive, customers may not feel engaged or in control of their plan.
- **Investigate Use of Customer Voice Software:** Assess whether Customer Voice can be used for this purpose. David Barton to arrange a demonstration for the IL Team, to see if it would work as a tool customers can complete themselves.
- **Explore NEC Support Module:** The NEC support module has been purchased for use with Independent Living, Furnished Tenancy, Safeguarding, and Rough Sleeper services. IL Management could investigate whether this case management system can improve the action plan process.

- **Test NEC Software:** The IL Team and management will soon attend a session to evaluate whether the NEC software meets requirements for interactive action plans.
- **Consider ReACT and Other Systems:** Review ReACT and other potential systems as alternatives for hosting interactive action plans.
- **Research Best Practice:** The Staff Focus Group suggested carrying out a research project to understand how other organisations manage action plans with customers. These findings can then be used to inform decisions on new systems or processes.

The customer will be brought off the service, if they are now living independently

- **Address Cleaning Issues:** Cleaning was mentioned as a problem in the customer interviews, and is a common concern in schemes. Officers should raise cleaning concerns with our contractor to enable a prompt resolution.
- **Manage Customer Expectations:** Discuss with the customer what can and cannot be provided by IL Officers to avoid misunderstandings.
- **Strengthen Offboarding Procedures:** Current offboarding processes need improvement. At present, the exit letter is one of the few steps completed. Consider developing a more structured approach to ensure consistency.
- **Improve Handover to General Needs:** Create a definitive handover process when customers transition to General Needs. Ensure customers understand what is happening and capture lessons from their experience.
- **Understand Non-Engagement:** If customers are not engaging with the IL service, investigate the reasons and address any barriers to participation.
- **Enhance Exit Form Usage:** The Exit Form is underused and currently focuses on practical aspects rather than customer experience. This should be reviewed, and possibly be completed by staff who are independent from the process, such as the Outbound Survey Assistants. This will help with gathering independent feedback, and learning from it.