



# The Tenant Engagement Toolkit

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An in-depth collection of Tenant Engagement ideas and best practice for social housing providers to implement right now.

## Introduction

Welcome to the Tenant Engagement Toolkit. My name is Johnathan Briggs and I am the CEO of CX-Feedback. If you don't already know us, we specialise in helping social housing organisations engage better with their tenants and improve their customer satisfaction ratings. We work with over 60 social housing landlords across the UK, and we see each of them bringing a constant flow of new ideas and approaches to their tenant engagement.



Every engagement team that we work with is incredibly keen to learn from the successes and lessons learned in other organisations. We are often asked to share best practice from across the industry, so we decided to collate the ideas and approaches of the highest performing social landlords into this one document, our Tenant Engagement Toolkit.

**60**

Social Landlords

**3 million**

Tenant **Survey Invites** Per year

**100+**

Tenant **Surveys Analysed** Per Year



# Tenant Engagement Toolkit

Documents and Videos for everyone

Engagement Strategy

Inspirational Ideas

Best Practices /Resources

We find ourselves in a unique position at CX-Feedback, where we can see the satisfaction scores and engagement levels of many housing associations and social landlords up and down the country. As a result, we have been able to understand and document the strategies, ideas and approaches used by the highest performers. To produce this toolkit, we have taken on board ideas from over 60 social landlords and the combined knowledge from over 3 million tenant survey invites and many hundreds of detailed tenant surveys that have been analysed. The toolkit information is available for free to everyone in the social housing sector - we hope that you find it useful.

### 1. Be “Targeted”

When we analysed the highest performing landlords, we found one big difference with their engagement strategies. All landlords send out tenant wide information and engagement, but the highest performing landlords “target” much of their engagement either to local areas or based on the individual needs or attributes of a tenant.

# The key to engagement is being “Targeted”

*“What matters to a tenant are things in their immediate neighbourhood  
or issues related to their personal circumstances”*

If we were to put ourselves into the shoes of a tenant, what really does matter to us?

We send over 3,000,000 social housing surveys every single year and that has helped us get a very good understanding of the tenant voice. Tenants are much less interested about more general things going on across their housing associations area than they are about things on their doorstep.

One of the Tenant Satisfaction Measure (TSM) questions will ask English landlords if they communicate to tenants about things that matter to them. Here are some examples of what matters to some of the tenants we surveyed this year: *“What matters is...*

*“...the dog mess on the green space outside my property where my children are playing”*

*“...when am I getting a new kitchen as my existing one is 20 years old”*

*“...my housing association providing information to me about pension credits to ensure that I receive all the benefits that I’m entitled to”*

The most successful high scoring social landlords target communication and engagement based on locality and individual need. **Targeted is key when designing an engagement strategy.**

## 2. Global Engagement to All Tenants

If we consider our engagement strategy as a pie, then the first two pieces of that pie are our “global communications” and our “global feedback”. When we say global, we mean all tenant / housing association wide types of communication and engagement, i.e. something that you send to everyone. Most housing associations are really good at this style of communication as it has been around for many years.

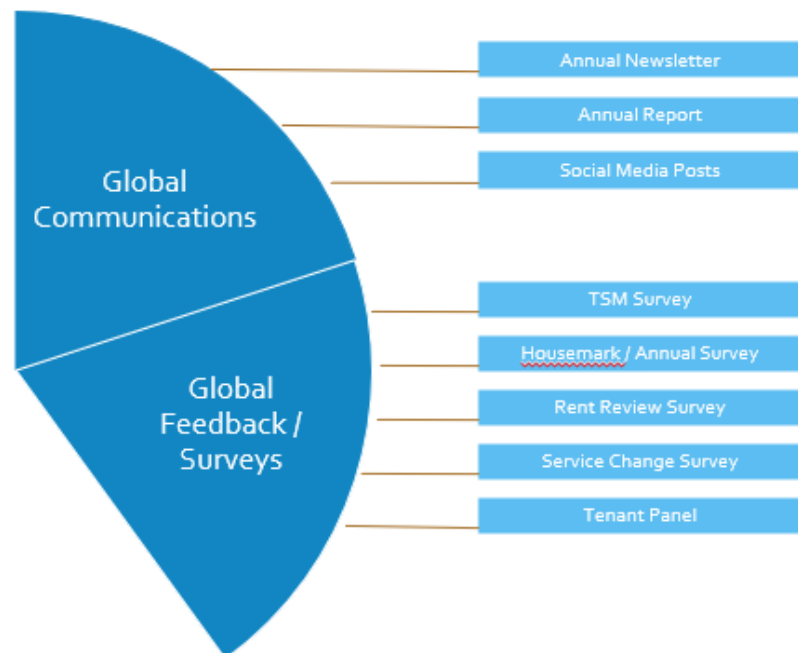
Although we have just underlined the importance of targeted communication, there is still an important place for global communication to ensure tenants are sent all of the information relevant to them, and for global feedback and surveys on topics that relate to all tenants.



### Global Communication

Examples of global communication might be an annual newsletter or annual report, or social media posts.

One thing to note here is that our evidence shows that tenants are increasingly preferring shorter digital communication, and whilst a well-presented annual newsletter still has its place, you should perhaps consider how much time and effort is spent on this.



### Global feedback/ Surveys

Examples of surveys that might be sent to all tenants

include the new TSM survey, an annual survey, or a rent review survey. As well as remote surveying, you may also have a number of different tenant panels to hear face to face from tenants. These panels can be very useful, but you must take care as they tend to attract the same type of tenant over and over again, which is not necessarily representative. I heard the CEO of one housing association call this “same voice syndrome.”

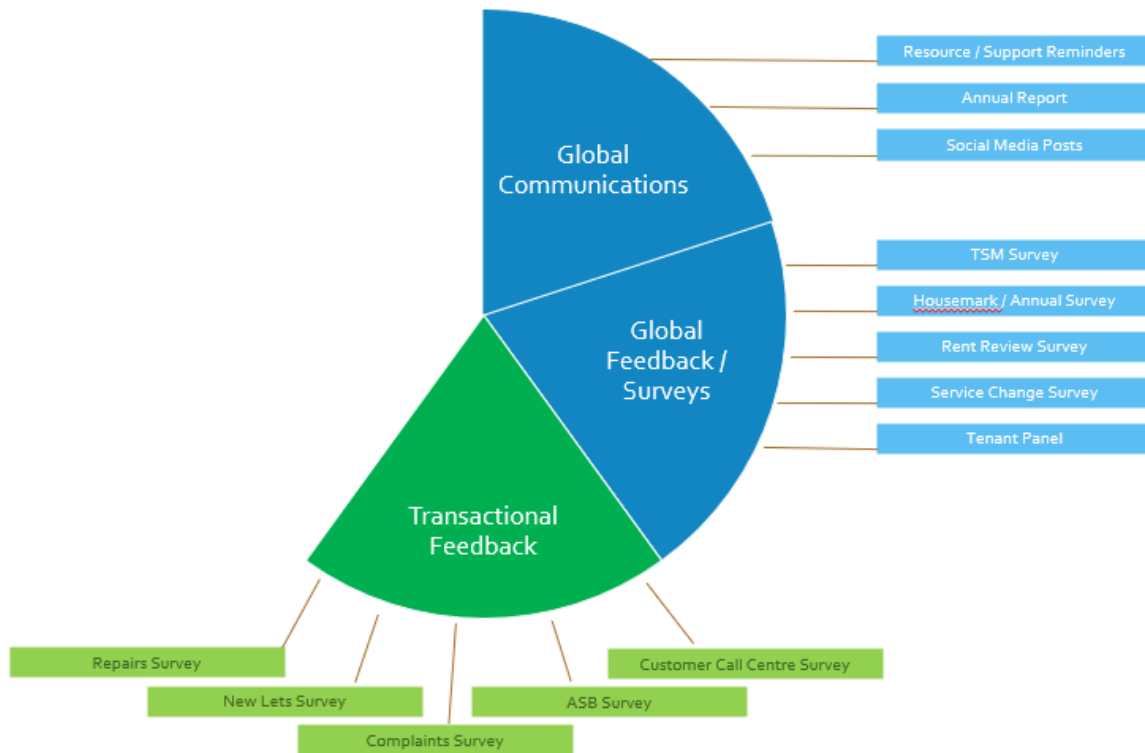
## 3. Transactional Engagement

Many social housing landlords have a range of transactional feedback surveys that go out automatically after a service has been provided.

In the past, some housing associations have seen transactional surveys purely a measure of their performance. However, tenants are just modern consumers, and as such they consider a feedback survey as being part of the service they receive. Even if they choose not to fill in such a survey, it provides a sense of security that there is an opportunity for them to connect directly with their landlord about a specific issue should it occur. In our view, it is therefore essential that you try to provide surveying and feedback opportunities for all tenants and not just a sample.

For example, we can send a repairs feedback survey to 20% of tenants who have recently had a completed repair, asking for their satisfaction rating. At the end of this we might have a score and some indicative comments to give us a general indication of how well we are performing on repairs. However, now consider that we send the repairs feedback survey to everyone who has had a repair, asking for their satisfaction rating. If they reply *unsatisfied* then we present them with the ability to take a photograph of the poor repair. On submission of the survey, the poor satisfaction response is detected and the photograph of the poor repair is immediately sent to the repairs manager to triage and decide what to do about it. Not only does this improve the customer service to the tenant allowing a speedy response, but it also improves the efficiency of the repairs team as a photograph can immediately show where things might have gone wrong. This only works if you survey all tenants who have had a repair and not just a sample.

Check out this video case study on how Golding Homes use photos within their repairs feedback surveys at: <https://www.cx-feedback.co.uk/library/pages/photo>

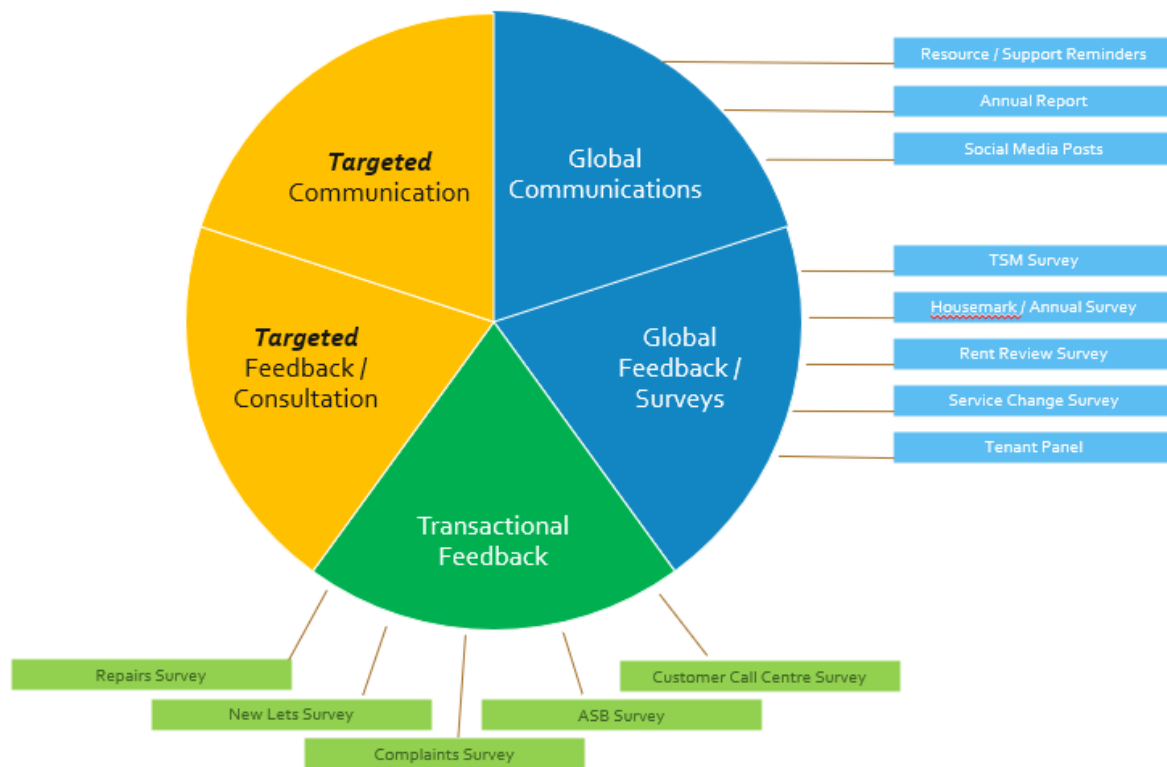


Sending a transactional survey to a sample group gives only an indication of performance. **Sending a transactional survey to everyone who's had that service improves customer service and genuinely helps the efficiency of your operations.**

#### 4. Targeted Engagement

I believe it would be fair to say that most landlords across the UK do a really great job of global engagement as well as transactional feedback. However, when we look in detail at the highest performing social landlords and their engagement teams, then they have a significant extra piece of this engagement pie. This is targeted engagement.

Targeted engagement is communicating with tenant and asking for their feedback about things that matter to them, in other words things that are very relevant to them. Sending out global / all tenant communications is often very general and as a result is often not relevant to particular groups of tenants. By engaging with tenants about things that matter to them and about things that are very relevant to them you will build a stronger and better relationship with them, where they will most likely provide you more positive satisfaction scores.

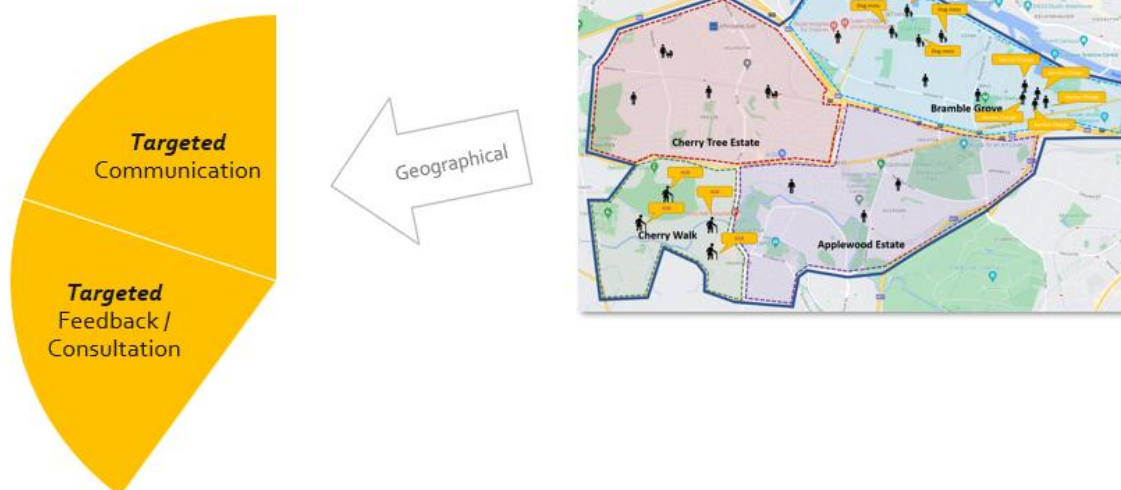


Just like the global part of our pie, the targeted part is divided into two sections, “targeted feedback and consultation” and “targeted communication”.

#### 4a. Targeted Feedback and Consultation

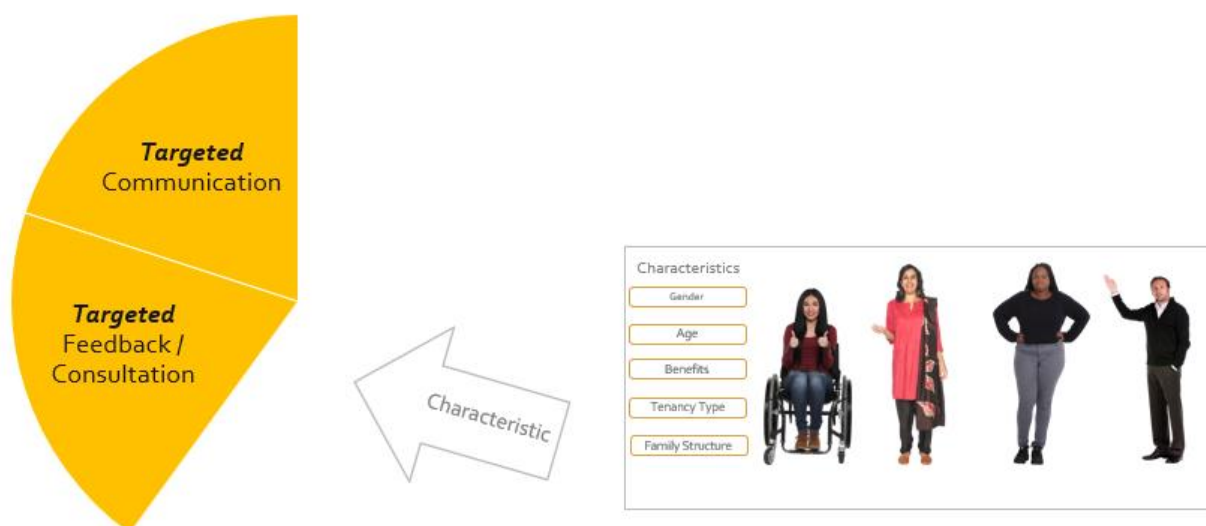
Most social landlords operate over a wide area. Within that area will likely be many patches, neighbourhoods, and schemes. Within these more localised areas it is very likely that there will be variations in types of tenant, for example in some schemes there might be more elderly residents whereas in others, more families. Each of these localised areas will have its own set of local issues that will concern its residents.

If you start to communicate with smaller groups of tenants about things in their local area that are more relevant to them, then you can make a huge impact on tenants’ lives and also improve their perception of you. An example of this is the housing association that’s surveyed 100 residents in a particular scheme. Residents were very unhappy about a damaged fence which brought down the neighbourhood and attracted anti-social behaviour. The fence was not the property of the housing association, so they investigated and found the company responsible for its maintenance and arranged for it to be repaired. With this and several other bits of information they had learned from the local consultation, they communicated with residents explaining their actions. This demonstrated to residents that they were listening, and clearly showed that they were on the side of the tenants.



#### 4b. Targeted Communication via Characteristics

In addition to localise targeting, you should have the tools and facilities to target your engagement based on the characteristics of a tenant. Within the data that you hold on tenants, you will almost certainly hold information on gender, age, the types of benefits received, the tenancy type, a tenants family structure, and numerous other useful characteristics.



We can use these different characteristics to target engagement at particular groups of people, and start communicating with them about topics and issues that are very relevant to them as individuals. You might also use this approach to signpost to other services or events. For example, there may be yoga classes running in the local community centre aimed at helping the well-being of over 65-year-old females. With the correct tools, you could easily produce a short bulletin targeting tenants that fit this criteria and encouraging them to join in with the classes. Alternatively, there might be some changes to a benefit such as Universal Credit. Using your specialist knowledge about benefits, you

may wish to communicate with all tenants that claim Universal Credit explaining to them the changes and ensuring that they receive all the benefits that they are entitled to.



Targeted engagement is how the highest performing housing associations achieve the best satisfaction scores. In the diagram above there are just a few ideas but we have an additional document that you can download, with 35 proven suggestions and ideas that we have collated from our social landlord cohort. You can download this PDF on our website here: <https://www.cx-feedback.co.uk/library/tenantengagementstrategy>

#### 4c. Timeline Example

In theory, targeted engagement makes a lot of sense but in practice it requires the right systems, tools, and organisation to deliver it. Very often engagement professionals will initially find this a little daunting however with the right systems in place it's actually very easy to deliver.

Let's now look at a theoretical example.



This is “Jane”. Jane is one of our tenants from the Applewood Grove area, she is female, 27 years old, claims Universal Credit, is a general needs tenant, has two children under 16, is a wheelchair user, and last year she volunteered to be part of a focus group.



Jane Smith  
Applewood Grove Estate

**Characteristics**

- Gender: Female
- Age: 25-35 yrs old
- Benefits: Claims UC
- Tenancy Type: General needs
- Family Structure: Has children under 16
- Has Disability?: Yes

**Opt in Groups**

- Focus Group: Yes

## Good Engagement: Engage with Jane 12 times per year

When we analysed the highest performing social landlords we found that they sent communication and feedback opportunities very frequently. Clearly there is a fine line between communicating with people often and overdoing it, but from what we see communicating with the tenant about 12 times per year appears to be the sweet spot. This makes a lot of sense because engagement is not dissimilar to marketing. In marketing these might be called touchpoints, and it would make a lot of sense to communicate with the customer approximately every month.

Let's now consider our previous engagement pie as various different timelines that Jane is part of.

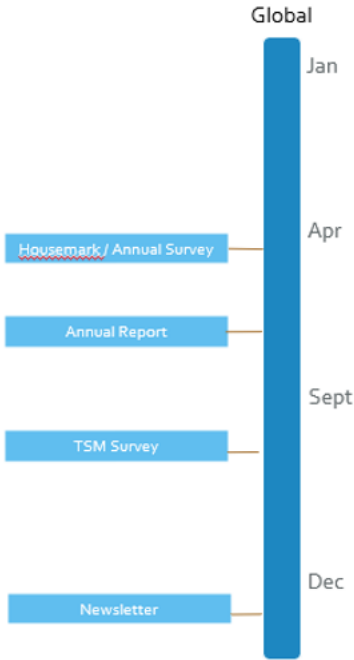
Firstly, as a resident, Jane will receive all of our global communication and feedback, which is sent to all tenants.

This means that in April, Jane receives the Housemark annual survey.

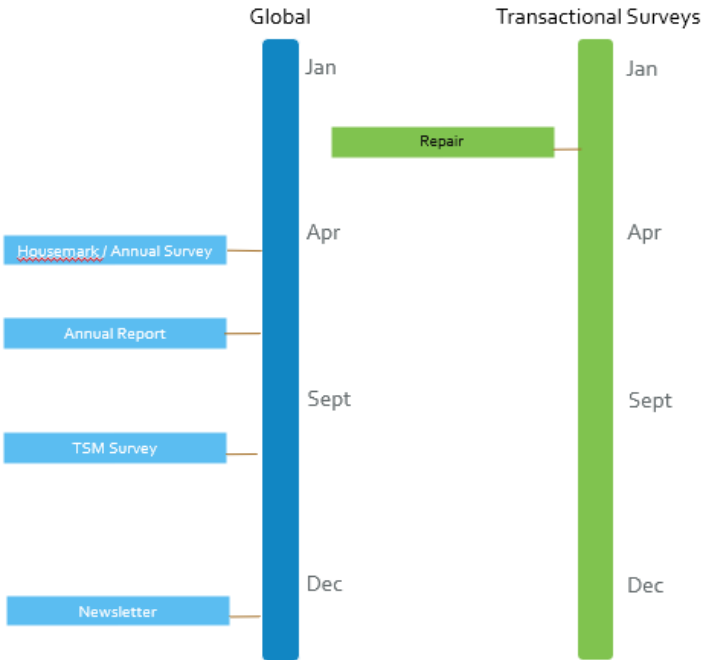
In the summer, she receives a copy of the annual report.

In October she is sent the TSM survey

Finally just before Christmas, she receives the housing association newsletter.



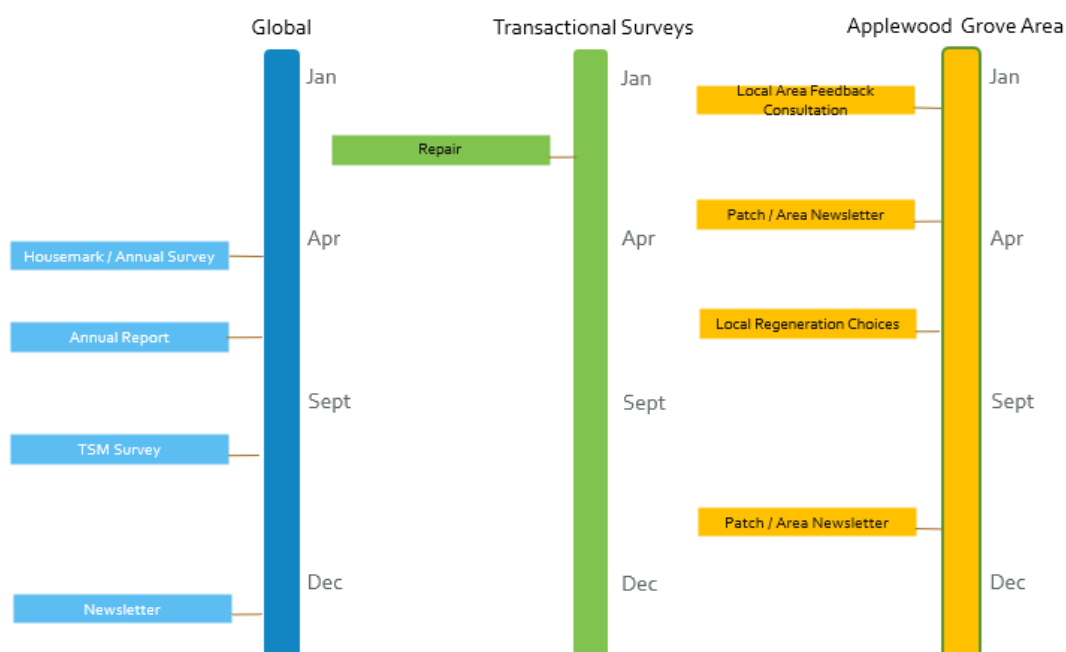
Now let's add to Jane's timeline the transactional surveys. Jane had a leaky tap in February and the repairs team came over and sorted it for her. On completion of the repair, she filled in a satisfaction survey, shown in the green timeline column below:



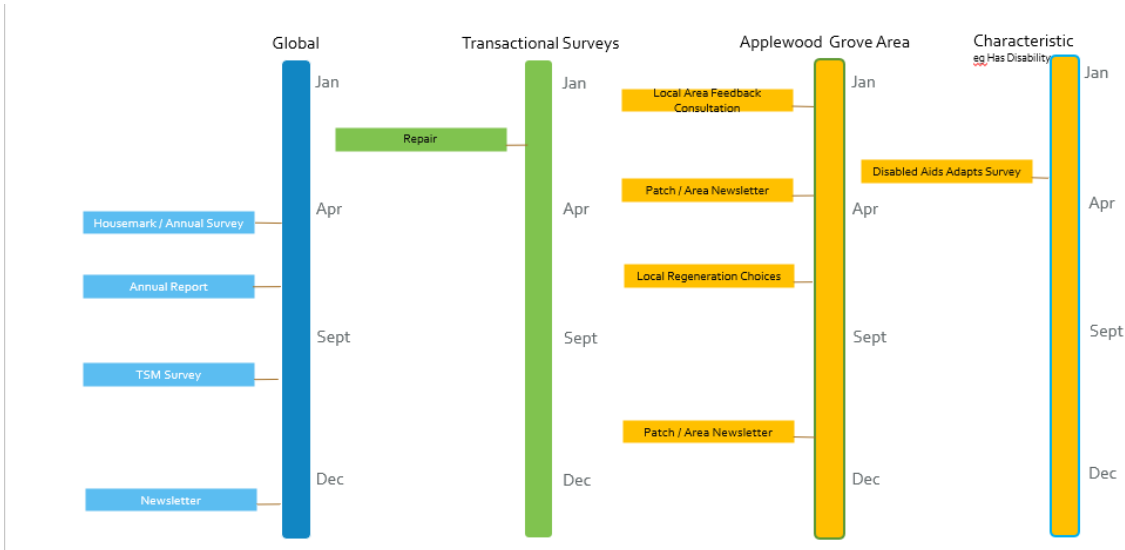
Jane lives in Applewood Grove, and as part of our targeted engagement we send the residents of Applewood Grove a survey about the local area at the end of January. Learning from the responses to this survey the local area manager quickly produces a 6-paragraph newsletter that can be dropped into a standard template and e-mailed / text a link out to residents.

Later in the summer, we have some money to spend on regeneration of a kids play park, so we invite the local parent residents (of which Jane is one) to pick from a series of options. Finally at the close of the year, the Applewood Grove estate manager sends another short newsletter focused on local issues.

These localised targeted engagements are shown in the orange timeline column below:



As we can see, Jane has many characteristics which can be used to target relevant communication to her. In this example, Jane is a wheelchair user. Every year the maintenance manager sends out a survey in March to all tenants with a disability asking them about the aids and adapts within their property, and whether they are sufficient for them to live as independently as possible. The results of this survey can be used by the maintenance team to plan their work schedules.

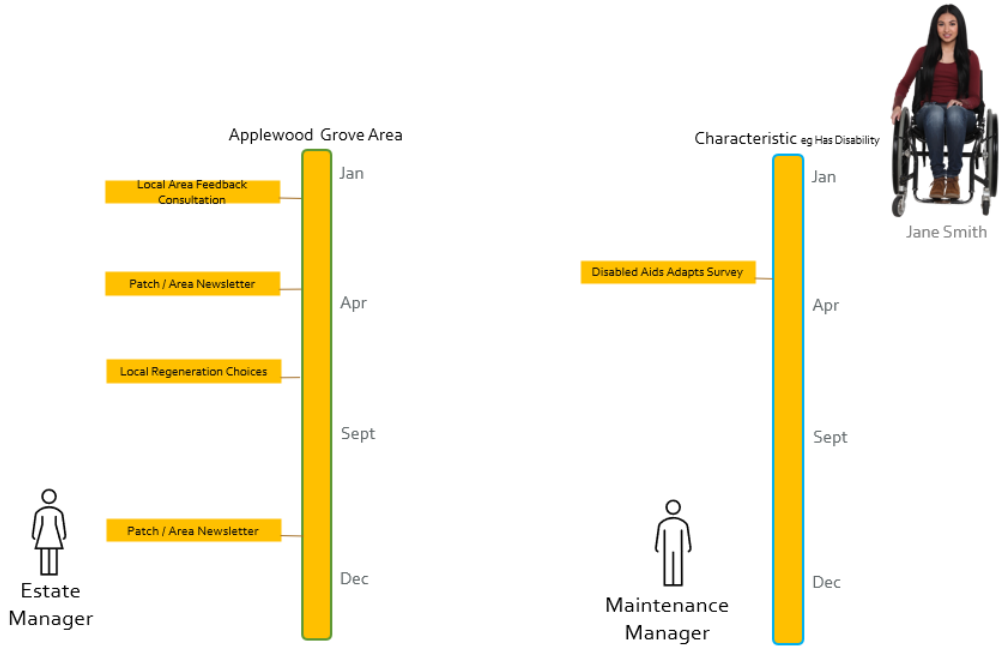


If you were to combine all of these timelines, then we can see that Jane receives communication and feedback opportunities throughout the year and a large proportion of these are very relevant to her.

### 5. Managing This Approach to Targeted Engagement

As I mentioned previously, some engagement professionals get a little alarmed by the thought of how they could possibly manage multiple timelines of engagement, but it's really not as difficult as you might think. There are two key things you must do to make this work:

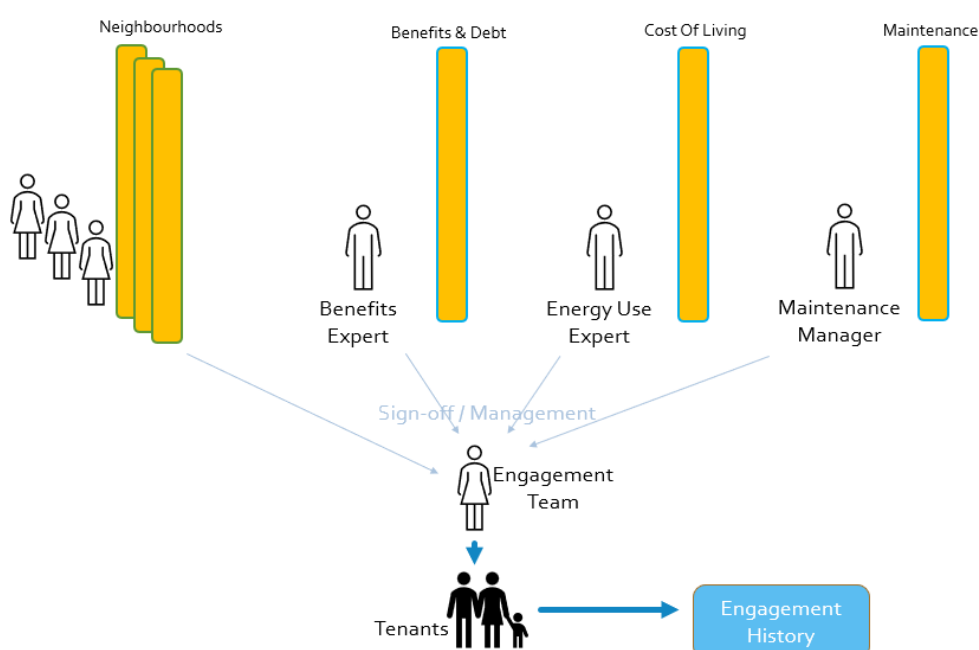
1. Ensure that you involve all the parts of the business.
2. Use the correct tools to manage things for you and make your life easy.



Let's look in detail at the two targeted engagement timelines for our example Jane.

The first timeline is for the engagement on Jane’s estate, Applewood Grove. This should be managed by the estate manager or somebody that you have on the ground that regularly visits the area. Most of the time, these types of local engagements start with some form of very basic survey, the backbone of which would be relevant to almost any area but will also include questions specifically relevant to this particular estate. The responses can be received and reviewed by the estate manager who then might put together a short newsletter summarising some of the points and acknowledging many of the concerns. We see the engagement professional’s role here is to oversee, support and to ensure this activity happens and that it is done in a way in which you’re comfortable.

There will also be many more operational types of engagements. For example, the aids and adapts survey. This might be more functional and completely managed and reviewed by the maintenance manager, but it should be considered part of our engagement strategy as this is a very relevant piece of communication to a particular tenant.

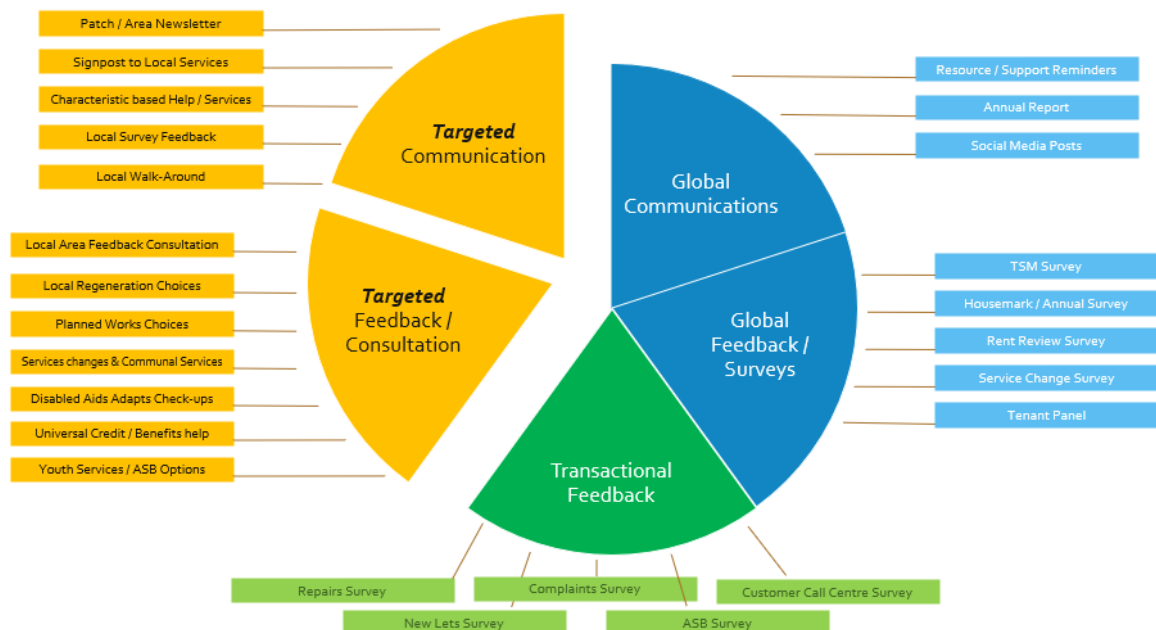


Once we expand this approach covering multiple different neighbourhoods and multiple different specialisms in the business, we are likely to have many timelines that we will be overseeing, but they will involve many people, with different expertise, from different departments. For example, our specialists in benefits maybe publishing short help guides on claiming the correct Universal Credit that we target at tenants who receive this particular benefit. All of these experts and managers can get involved in engagement, but the engagement team should oversee and effectively sign off everything before it goes out to tenants. This will ensure that the branding is appropriate, the communication method is in the chosen defined style, and that we are not inadvertently over-communicating with one particular group.

In an ideal world, you should have tools that allow you to store an engagement history against tenants or groups of tenants. This way you can see the full history of communication across many timelines to a particular tenant or see areas where our engagement is lower than we would like.

## In Summary

# Engagement Strategy



The diagram above illustrates our entire engagement pie. Within this pie are multiple different engagement ideas and techniques that we might use. Using the Egnagement+ module of CX-Feedback is a cost-effective, one-stop-shop solution to help social housing landlords deliver strong tenant engagement and raise customer satisfaction levels.

## Ready to build your tenant engagement?

For more information, please visit the resource hub of our website for more ideas, videos and content:

<https://cx-feedback.co.uk/library/tenantengagementstrategy>

Or contact me, Johnathan Briggs, if you would like to discuss how we can help you to implement your tenant engagement strategy: [jbriggs@cx-feedback.co.uk](mailto:jbriggs@cx-feedback.co.uk)

To arrange a demo of how our CX-Feedback, the UK's leading tenant engagement platform, could work for you in delivering a tenant engagement strategy, please contact Fraser Campbell:

[fcampbell@cx-feedback.co.uk](mailto:fcampbell@cx-feedback.co.uk)