



CX-FEEDBACK SERVICE DEFINITION DOCUMENT

Proposal

CX-Feedback is the UK's leading tenant engagement platform. It has been designed in conjunction with all 110+ of our social housing customers to be the best platform for increasing tenant engagement and helping you to be better informed, to make the right decisions, and to make a difference.

Trusted by over **110 social landlords**, our easy to use yet powerful platform has been designed to put you in control, saving you time and money. Whether its triggering transactional surveys or targeted engagement for local areas, CX-Feedback is a one-stop-shop designed to automate the manual processes and give you instant feedback to allow you to make a difference to your tenants.

How will CX-Feedback benefit you and your tenants?

Improved Service Provision: CX-Feedback helps you to understand tenant needs, enabling you to tailor services, maintenance, and community initiatives to better suit your residents.

Tenant Satisfaction: By addressing concerns and improving services based on feedback, you can boost tenant satisfaction, leading to higher engagement rates and positive word-of-mouth.

Efficient Operations: The insights from CX-Feedback can streamline processes, reducing inefficiencies and costs in property management and maintenance.

Strategic Planning: Understanding tenant perspectives aids in strategic planning, ensuring that you invest resources where they're most needed or valued by the community, creating tenant-led services.

Compliance and Standards: CX-Feedback will highlight areas where you may be falling short of regulatory or quality standards, allowing for proactive adjustments to meet compliance requirements.

Community Engagement: CX- Feedback's intuitive mechanisms can foster a sense of community involvement, encouraging tenants to participate in decision-making processes and initiatives that directly impact their living conditions.

"We've been using the CX Feedback system since August 2021 and it has been a central tool in helping us to achieving a complete transformation of our customer engagement practices here at Golding Homes" Lin Perkins Customer Experience and Engagement Manager



Your Objectives

- Create a centralised platform to unify survey format and analysis across the business
- Easily create surveys and questionnaires to distribute online and offline
- Automate manual parts of the feedback process to save time and resources
- Create a more real-time, responsive feedback process
- Connect to your current systems to automate triggered surveys

What's Included

An integrated tenant engagement solution, CX-Feedback has been designed to be easy to use and take the burden out of tenanted feedback and communications.

- | | |
|---------------------------------------|------------------------------|
| • Easy to create survey platform | • Personalized service |
| • Easily Integrates with your systems | • Housing focused user group |
| • Targeted Engagement | • Transactional surveys |
| • No hidden Cost | • Live dashboards |
| • Up and running in 2-6 weeks | • Targeted E-News Letters |

CX-Feedback – Social Housing Leading Engagement Platform

CX-Feedback offers a unique solution to the housing sector. Packed with robust functionality and an easy-to-use interface, we now process more than 3 million surveys a year.



"CX-Feedback has been a game-changer for our tenant engagement. We have been able to engage with our tenants in different areas and adapt our services to meet their local needs."

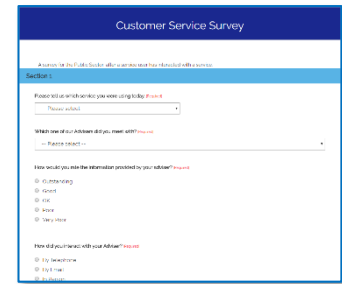
Susan McDonald, Operations Director



Surveys and Reporting that make a difference.

Easily Build Surveys

CX-Feedback's easy to use interface makes building surveys a breeze. Simply choose your questions and question types, and CX-Feedback does the rest. Surveys can be triggered automatically in response to a customer interaction to provide real-time feedback, or sent in a batch to provide a snapshot survey annually, monthly or more frequently.



Total Score	Age	Preferred Communication	1	2	3	4
69	41-50	Text	75	80	85	100
88	18-30	Text	75	100	100	75
81	61-70	Letter	100	75	75	75
69	61-70	Phone	50	75	75	75
84	31-40	Text	75	100	100	100
29	51-60	Email	25	25	100	50
75	51-60	Letter	75	50	75	75
75	18-30	Text	75	75	75	75
69	41-50	Phone	75	100	75	75
69	51-60	Letter	75	50	100	50

Automation Saves you Time

CX-Feedback's Automation tools allow you to reduce the time you have to spend sending surveys, gathering results and analysing trends. Set triggers to send transactional surveys automatically. Incoming results are automatically put into your data and all calculations redone instantly on your charts, dashboards and reports.

Artificial Intelligence does the hard

work

Leave it to our A.I. algorithms to read your survey responses, score your text based answers using Natural Language Programming, and automatically escalate good or poor responses to the relevant member of your team, based on a pre-defined score you set.



World Class Analytics delivers answers

CX-Feedback's world-class analytics suite gives you more insight into your feedback data than ever before. Segment your data according to any criteria, chart your results across time and learn more about your customers than you ever thought possible. Start making data driven decisions.



Drilldown Analytics for In Depth Reporting

Using CX-Feedback's ability to connect data from your existing systems to your survey data automatically, you can break down and analyse your data by any characteristic to make sure you're being inclusive and representative.

- Location
- Neighbourhood
- Patches
- Property Types
- Tenancy Types
- Age Brackets
- Demographic Segmentation
- And anything else in your system

An Introduction to the Engagement+ Module

After several years of working with housing associations up and down the country, we began to learn their frustrations about the lack of tools available to provide the tenant engagement experience that they wanted. The COVID-19 lockdowns have left many housing associations looking for flexible and adaptable tools that can be used to communicate and also collect and engage with tenants. No longer is engagement seen as a single global communication to all tenants, it has become clear that different groups of tenants have different needs and therefore need to be engaged in a unique manner.

Learning from these experiences we have created the Engagement+ module. This provides a versatile engagement platform that puts tenants at the centre.

The Engagement+ module for CX-Feedback makes it very easy for housing associations to create large or small-scale surveys and batch communications with any subset of their tenants. The product synchronises with the housing associations housing management system and allows a user to create a new engagement group based on any criteria in just a few seconds. For example, say you wanted to ask over 70 female residents some questions about their well-being and react accordingly.

The Engagement+ module provides a toolset for communicating with tenants, collecting information from them, benchmarking performance, tracking and supporting them based on direct need and providing them information. The Engagement+ module was written specifically for housing associations - taking on board their ideas and input to create a toolset that delivers great value.

Key Features

Automatically Sync with Your Housing Management System

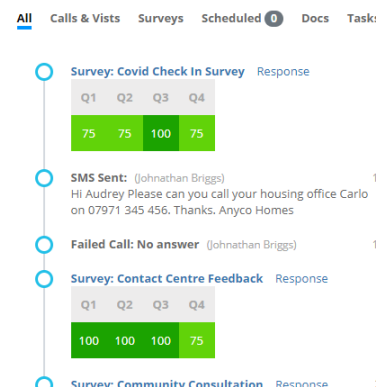
At the centre of the Engagement+ module is a list of all of your tenants. This tenant list is kept up to date from your housing management system with our fully automated connector. We can connect to all housing management systems and the set-up time can be measured in hours. As you update any tenant details in your housing management system or remove tenants then the changes will automatically be synchronised to the Engagement+ module.

You can choose which fields you wish to synchronise for example age, gender, Patch, housing officer, region, property type etc. Quite often there is a need to add a new field, for example, say, "Part of Tenant Panel". This takes just a few seconds in Engagement+ module and you can use it to send out surveys or forms and collect new information from your selected tenants.

Instant Engagement Groups

Using your tenant data, it takes just a few seconds to create any number of engagement groups, for example:

- Tenants Aged over 70
- Tenant who have lost their jobs due to COVID-19
- Tenants in Patch A with families
- Tenants living in Block A



View	Dashboard	Surveys	Calls & Vists	Tasks
1	1	1	1	1
2	2	2	2	2
3	3	3	3	3
4	4	4	4	4
5	5	5	5	5
6	6	6	6	6
7	7	7	7	7
8	8	8	8	8
9	9	9	9	9
10	10	10	10	10

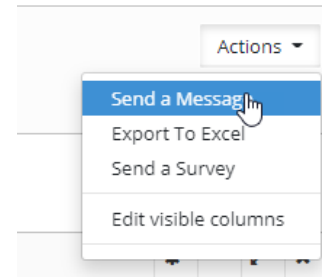
You can create any number of simple or complex filters to build an engagement groups. Once you have an engagement group you can send batch messages via SMS or email, invites them to fill in a survey and see a dashboard showing important information about those tenants and any responses.

With just a few clicks you can send them digital resources, maybe that's how to claim Universal Credit, where local food banks are, or to offer them support and automatically track any follow up actions.

Groups can not only be used for digital communication but also manual follow up. If you have a group of elderly residents that is more appropriate to phone, then the Engagement+ module provides a simple interface that makes it easy for your staff to offer them the same engagement levels.

Individual Tenant Engagement

Using the Engagement+ module you can drill right down to an individual tenant record. You can view their entire engagement history, view satisfaction levels for previously completed surveys and information that you may have sent them and batch communications. Within this tenant view you can send them a text or email invite to a survey or complete it with them on the phone. You can also log and track any outstanding follow-up actions or send them sign posts to digital and community resources.



Auto Surveys

One of the best ways to engage with tenants is to send them periodic surveys. In the past this has always been a complex and time-consuming job for housing associations. With Engagement+ you can now create auto surveys which will send a survey out to tenants



automatically based on some date within their record. Typical uses for this are sending a “new let” survey a few days after they've moved in or an anniversary survey on each subsequent year after their tenancy start date.

When an auto-surveys is combined with the A.I. escalation this can provide an tenant engagement “on autopilot”, with fully automated sending and immediate alerts to anything that should require your attention.

Self-Service Opt-out management & Contact Detail Updates

Many housing associations know the importance of having good quality tenant contact details. Those with good quality contact details are able to be very fast and efficient in communicating and supporting their tenants. The Engagement+ module adds a number of tools to allow tenants to confirm their contact details are correct, update them if required and manage opt out and communication preferences. Any change in communication details can be exported as a report for manual update into your housing management system or can be pulled automatically for immediate electronic update via our API.

Phone Call Management

Whilst digital engagement is the preferred method of communication for the majority of tenants, for some this is more difficult. For example if you have groups of tenants with assisted living then he may be calling them every week or two to check everything is okay. The Engagement+ module is designed to make this easier for you calling teams allowing you to create assisted living engagement groups, track phone calls, alert to multiple “no responses” and log follow up actions.

We can also offer the ability to outsource some of your telephone call surveys to us, so that we can ensure your surveys are as inclusive as possible. We use a ISO 20252 certified specialist telephone research agency partner who will take the greatest care to follow Market Research Council guidelines and represent you perfectly with your tenants when undertaking phone calls.

Implementing CX-Feedback

Step one of setting up your account is scoping out your current surveys and methods to find where we can best help. Connecting to CRM systems, Housing Management Systems, or current Excel files is easy.

Once we have set up your surveys, you can begin the exciting process of learning how to present, explore and analyse your survey results. Traditionally this would have been a skilled and time-consuming process, but with CX-Feedback you can take complete control of your survey data and build charts, dashboards and reports showing exactly what you need to see.

As part of our implementation process we can drive forward these initial surveys and dashboards for you or we can teach you to experiment and discover for yourself.

Once you have your dashboards and reports set up you can think about how you would like to share this information. You may choose to add security on different dashboards so reports and dashboards are shared on a need-to-know basis or give client login details so they can access only their own data.

We know that in the real world, there is no getting away from some aspects of reporting being confusing and complicated. With CX-Feedback this is not a problem as our team of experts are always here to help you achieve your goals.

Typical Timescales & Process

Implementing CX-Feedback can take anything from a week to a couple of months. This largely depends on the availability and quality of your current feedback data. In either case we will help and assist you every step of the way. Our team will take the time to understand your objectives and take you through our proven process.



Project Objectives

1. Establish a robust and efficient system to collect and analyse tenant feedback.
2. Identify key areas of improvement in tenant experience and satisfaction.
3. Develop targeted strategies and action plans to address identified pain points.
4. Help foster a culture of continuous improvement within your organisation.
5. Monitor and track the impact of implemented changes on tenant satisfaction.

Discovery and Requirements Gathering

1. Kick-off meeting to align project goals and expectations
2. Conduct interviews and workshops with key stakeholders
3. Identify pain points, requirements, and desired functionalities
4. Confirm project scope and deliverables

Phase 3: Deployment and Training

1. Complete Integration to internal systems
2. Design, build and test initial surveys
3. Set up all initial report and dashboards
4. Conduct comprehensive user training sessions for staff
5. Present training materials, including manuals, video tutorials, and FAQs

Go-Live and Post-Implementation Support

1. Transition to CX-Feedback
2. Monitor performance and gather user feedback
3. Provide ongoing support and software updates as needed
4. Advise on analysing collected feedback to identify trends, patterns, and areas of improvement.
5. Advise on communicate findings and proposed changes to staff, board members, and tenants.