

THE CEO INFLUENCERS LLC BUSINESS CASE STUDY 11

Transforming Customer Service

Through Evidence-Led Community Engagement

A Housing & Community Services Provider | United Kingdom

6,000+

Customers Surveyed

2

Housing Partners

100%

Exec Buy-In Achieved

NEW

Service Model Launched

EXECUTIVE SUMMARY

This case study examines a flagship strategic research and service design initiative delivered by a leading Greater Manchester community housing provider. The programme addressed a critical gap in understanding the unmet health and housing needs of over 6,000 residents, translating those findings into real, measurable improvements in customer service and support.

Through rigorous survey design, executive-level persuasion, service model innovation, and sector-leading public consultation, the initiative reshaped how the organisation delivers support to vulnerable residents, most notably older people living in Sheltered Housing Schemes.

"This is what customer service transformation really looks like: listening at scale, building the evidence, persuading leadership, and designing services people actually need."

BACKGROUND & CONTEXT

The organisation manages thousands of properties across the Northwest of the UK, serving diverse communities experiencing significant health inequalities and housing pressures. In the years preceding this initiative, the organisation lacked comprehensive, data-driven insight into the lived experiences of its residents, particularly those with intersecting health and housing vulnerabilities.

Older residents in Sheltered Housing Schemes represented a particularly underserved customer group: isolated, medically complex, and often falling between the responsibilities of housing providers and NHS community health teams. Without robust evidence, making the case for investment in new customer services was challenging.

The strategic imperative was clear: gather the evidence, build the business case, and design customer services that would genuinely make a difference.

THE CHALLENGE

The initiative addressed interlinked challenges at both organisational and customer levels, each reinforcing the other.

ORGANISATIONAL CHALLENGES	CUSTOMER CHALLENGES
- No systematic data on resident health and housing needs - Limited cross-sector collaboration with NHS and community health partners - Senior leadership unconvinced of the need for new service models. - Outdated allocations policy misaligned with community reality. - Lack of public awareness and community buy-in for new programmes	- Unmet health needs going unidentified and unsupported. - Older residents are isolated in Sheltered Housing with no specialist services. - Residents unaware of available community programmes - Housing allocations do not reflect actual vulnerability or need. - Limited voice in shaping services that affected their daily lives

THE APPROACH: FIVE STRATEGIC WORKSTREAMS

The programme was structured around five interconnected workstreams, each designed to move the organisation from assumption-led to evidence-led customer service delivery.

1

Large-Scale Community Health & Housing Needs Survey

A full-cycle research programme was designed and delivered end-to-end, from questionnaire architecture and sampling methodology through to data analysis and strategic reporting. The survey reached over 6,000 customers, making it one of the most comprehensive resident insight exercises undertaken by a Greater Manchester housing association at that time. The research was designed not merely to collect data, but to generate actionable customer intelligence, structured specifically to feed into strategic planning cycles and inform tactical service design.

2

Executive Engagement & Evidence-Based Advocacy

Translating research into action required more than good data, it required persuading a senior executive team to reorientate organisational priorities. A targeted briefing strategy was developed, presenting findings in a format that connected directly to board-level strategic objectives, regulatory requirements, and reputational opportunity. This work resulted in full executive endorsement for a new evidence-based service development agenda, with senior leaders committing resource and sponsorship to pursue the innovative customer service models the research had identified as priorities.

3

National Allocations Policy Audit

A comprehensive quality review audit of the housing allocations policy was designed and implemented, benchmarking against national frameworks, regulatory guidance, and best practice from comparable organisations. The audit identified material gaps between existing policy, and the evidence of community need and produced a structured set of recommendations to modernise policy so that allocations decisions better reflected actual customer vulnerability, health complexity, and housing need.

4

Public Consultation & Community Awareness Campaign

Sector-leading public consultation workshops were designed and delivered on the future of social housing for older people. These events were structured not as passive information sessions but as active participatory processes, bringing together residents, community organisations, health professionals, and housing sector voices to shape the direction of new customer programmes. The workshops dramatically increased both public awareness and community support, creating a platform of civic backing that strengthened the case for continued investment.

5

Sheltered Housing Service Model Design

Drawing on the combined intelligence of the survey findings, executive engagement outcomes, policy audit recommendations, and public consultation outputs, a new integrated customer service model was designed for residents in Sheltered Housing Schemes. This model brought together housing management, health monitoring, and community connection in a structured service offer tailored specifically to the needs of older, vulnerable residents who had previously been underserved.

REAL OUTCOMES: ORGANISATION & CUSTOMERS

Organisational Outcomes



INTELLIGENCE

Evidence-Led Customer Strategy

The organisation moved from anecdotal service planning to a data-driven strategic model grounded in the verified needs of 6,000+ customers. The survey became a cornerstone reference for organisational planning, informing budget priorities, service design, and stakeholder reporting across multiple annual cycles.



LEADERSHIP

Full Senior Leadership Commitment

Secured full executive management endorsement for a new evidence-based service development agenda, unlocking organisational resource, leadership sponsorship, and strategic priority status for the new community health and housing customer programme.



POLICY

Modernised Allocations Framework

The national policy audit produced actionable recommendations that materially improved the alignment between allocation decisions and the real health and housing vulnerabilities of applicants, strengthening regulatory compliance, service fairness, and customer outcomes.



PARTNERSHIP

Cross-Sector Collaboration

Established durable partnerships with major housing providers and NHS community health professionals, creating shared frameworks and joint working structures that extended reach and capability well beyond the organisation's own resources.



PROFILE

Sector Leadership Positioning

The consultation workshops elevated the organisation's public profile and reputation, generating significant community support that underpinned programme sustainability and strengthened standing with local authorities, commissioners, and funders.

Customer Outcomes

VISIBILITY

Unmet Needs Made Visible

Thousands of customers whose health and housing needs had gone unrecognised now had those needs formally documented, evidenced, and incorporated into service planning, creating a direct pathway from individual circumstance to organisational response.



SERVICE

Better Support for Older Residents

Residents in Sheltered Housing Schemes gained access to a new model of integrated customer support designed specifically around their needs, combining housing management, health monitoring, and community connection in ways not previously available.



FAIRNESS

Housing Matched to Real Need

Policy reform resulting from the audit meant that housing allocation decisions became more accurately calibrated to actual health complexity and vulnerability, improving fairness and ensuring the most in-need customers received appropriate placements.



VOICE

Residents Heard and Consulted

Public consultation workshops gave residents a genuine participatory role in shaping the future of their housing and community services, increasing trust in the organisation, and ensuring new programmes reflected lived customer experience, not assumptions.



HEALTH

Joined-Up Community Health Support

The partnership model with NHS community health professionals created new referral pathways and coordinated support for customers with complex health needs, reducing gaps between housing and healthcare provision.

STRATEGIC IMPACT

This initiative demonstrated that housing organisations can become genuine community health partners, not simply landlords, when they invest in rigorous research, courageous advocacy, and co-designed service innovation. The programme sets a new benchmark for evidence-led customer service practice in the sector.

KEY LEARNINGS & TRANSFERABLE PRINCIPLES

These principles are directly transferable to any organisation seeking to elevate its customer service offer through evidence, engagement, and co-design.

1. Evidence is the most powerful customer service currency.

Large-scale, rigorously designed community research is a compelling internal advocacy tool. Data that connects directly to strategic objectives and regulatory obligations is far more persuasive to senior leadership than anecdote or assumption, and it keeps the customer's voice at the centre of every decision.

2. Policy must follow evidence, not the other way around.

Customer service frameworks designed without regular reality-checking against resident data will drift from the needs they are meant to serve. Structured audits benchmarked against national standards are essential to keeping policy grounded in lived experience.

3. Public consultation creates momentum and legitimacy.

Well-designed community engagement events do not just inform, they generate the civic energy and reputational capital that sustains ambitious customer service programmes through implementation challenges. Community voice is a strategic asset.

4. Partnership is architecture, not just relationship.

Sustainable cross-sector customer service collaboration requires shared frameworks, aligned outcomes, and structured joint-working, not just goodwill. The most impactful partnerships are built on common evidence, shared objectives, and clear accountability.

