

# Onboarding Policy

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## 1. Application

This policy will apply to the following entities:

Legal & General Affordable Homes Limited  
 Legal & General Affordable Homes (AR) LLP  
 Legal & General Affordable Homes (SO) LLP  
 Legal & General Affordable Homes (Capital) Limited  
 Legal & General Affordable Homes (Development 3) Limited  
 Legal & General Affordable Homes (Investment 1) Limited  
 Legal & General Affordable Homes (Investment 2) Limited  
 Legal & General Affordable Homes (Investment 3) Limited  
 Legal & General Affordable Homes (Development 4) Limited

For the purposes of this policy, any reference to LGAH shall be relevant for all the entities listed above and administrated, if applicable, by its Management Providers.

### 1. Purpose

LGAH is committed to ensuring all customers have a first-class experience when moving into their home and feel settled as soon as possible. LGAH's value drivers for customer onboarding are to provide an experience which promotes comfort and convenience and to enhance customer trust in the products and services we deliver. To enable this, LGAH will adopt the approaches detailed within this policy.

The onboarding policy is intended to work in parallel with LGAH's development process. This is intended to ensure that wherever possible customers are onboarded and prepared for moving into their home on the same day as the physical handover of the unit from the developer.

LGAH will work with its Management Providers and other Stakeholders to ensure the principles within this Policy are adopted across each scheme being delivered and where required a tailored approach is developed.

### 2. Aims

The onboarding policy aims to deliver:

- An experience which showcases LGAH's approach to customer experience through its Customer First mindsets and behaviours
- Reassurances for the customer through providing comprehensive information about the property, their tenancy/lease and who to contact for any future enquiries
- Minimal void loss time by preparing the customer for when the property is ready
- Reduced customer churn through effective and regular engagement
- A comfortable and convenient service to the customers, which does not overwhelm them at any one point.

The outcome of successfully achieving these deliverables is a **55+ Net Promoter Score** for new customer satisfaction feedback on the onboarding experience.

### 3. Policy Statement

This policy applies to both shared ownership and rented homes. Both tenures will involve all the key steps set out in this policy, but the organisation who is responsible for its delivery may differ.

- Rented Units – onboarding will be led by LGAH's Management Providers who will be involved from site mobilisation, onboarding through to customer settlement. LGAH Customer Care Team will also be on site where possible to welcome customers directly.
- Shared Ownership - LGAH internal Sales Team will work closely with LGAH Customer Care Team who will be responsible for home demonstrations and the overall onboarding experience post exchange.

LGAH believe there is no substitute for face to face interaction to deliver the best possible onboarding experience, especially when the customer has their home demonstration and when it is time for them to collect their keys.

This policy takes face to face interaction as its starting point. In exceptional circumstances it may be more appropriate to deliver a fully remote onboarding experience, but LGAH would expect to discuss this on a site by site basis with Management Providers and Sales Agents to consider if it is the best interest of the customers. As the business matures this policy approach will be kept under review to ensure customer experience is maintained and resources deployed to maximum effect across LGAH and its partners.

#### **4. Relets and Resales**

LGAH Management Providers will maintain overall responsibility for the void process and subsequent reletting of the property. This will follow pre-agreed nomination processes with the Local Authority.

The timescales for customer onboarding of a re-let property will be less than a new build therefore some of the steps indicated below can either be condensed or amalgamated depending on how quickly the void property will be ready of occupation. The overall standards and expectations of onboarding however will be consistent to the experience customers receive at first let stage.

For shared ownership resales, these are expected to be significantly less than relets therefore LGAH will use a tailored approach to each sale on the best contact and method to onboard new shared owners once their sale is finalised.

#### **5. Key Stages**

##### 5.1 Site Mobilisation

LGAH will begin site mobilisation six months prior to the expected practical completion date for a new-build development.

This is to ensure that all parties have sufficient time to prepare for customer onboarding and is documented within LGAH's development handover guidance which is adopted for every site mobilisation. LGAH expect all partners to engage fully in Site Mobilisation to ensure that all staff who will be involved in customer onboarding have a full and through understanding of sites and can provide support to customers.

The key elements of this process linked to customer onboarding include:

Timing	Process	Purpose	Key stakeholders
6 months to completion	Site overview. LGAH's PQM will showcase the development, going through the key elements of the build, units and tenure split being delivered and current site progress	To allow all relevant parties to get a good understanding of what is being delivered and to raise any early queries	LGAH Operations Team, LGAH Sales Team, MP key delegates across operations and asset teams
Familiarisation visits	At least two site meetings will be arranged prior to completion.	To allow stakeholders to get a better look and feel for the site, and are able to address any onboarding practicalities more precisely on site	Customer Care Coordinators, Sales Managers, MP asset lead and operations lead, Developer Site Manager
Monthly/weekly meetings	These will be arranged throughout the build programme to provide an update on development process and handover dates	To allow the MP to prepare for customer onboarding and site management. For sales agents to pre-plan property completions	LGAH Operations Team, LGAH Sales Team, MP key delegates across operations and asset teams
Attestation and handover checklist	Sign-off a minimum of 5 days before practical completion to confirm the property is ready for occupation and all critical documents have been received	To ensure the completed unit has passed all compliancy checks and has been reviewed across teams to provide reassurance on quality	LGAH Operations Team, LGAH Sales Team, LGAH Finance Team
Property Handover	Final handover from the developer to LGAH operations/sales/MP	To prepare for customer onboarding to minimise the number of vacant homes	All parties

## 5.2 Pre-Move In

### Preparing the customer

After a home has been reserved or allocated, all customers will be kept informed of development progress, status of their home completion date, and support with queries they might raise. As a minimum all customers will be contacted once every fortnight. For rented units this will be done by the Management Provider, and for shared owners it will be LGAH Customer Care Team.

### Key information

Customers will want to prepare for moving. Sharing key information early-on will avoid overwhelming them on the day that they move in. This will include sharing property related information, what type of tenancy or lease they will sign and who will be their Management Provider. This may include additional information for shared owners where they are taking over more responsibility for their home.

### Viewings

It is beneficial for all customers to view the property before they accept or reserve a home. This allows them to get a good overview of their home, to ensure it meets their needs and they are happy with all aspects. However, there are occasions where a viewing is not possible before the property is ready to let, therefore a customer may view the property for the first time at point of sign-up.

Wherever possible we will seek to facilitate viewings to minimise any potential letting delays or rejections. Where safe to do so, this will be done during the last stages of build or void works.

If a customer views a show home, or a unit on scheme that is not the same as the one they will move into, clear guidance must be provided around any differences between the two units.

### Property Handover Day

The day when keys are given to the customer is a critical stage with some customers viewing the property for the first time. It is important for LGAH to ensure they are reassured on the quality of home and settling-in experience.

This will be conducted on-site alongside the customer within their new home, unless agreed otherwise between LGAH and the Management Provider or Sales Agent.

## **6 Use of Key Safes**

If the overall onboarding experience is taking place virtually, this might include utilising digital sign-off of key documents and installing key safes for customers to access the home directly

In these circumstances the Management Provider will be responsible for installing key safes, ensuring they do not permanently damage the external façade of the property. They will be responsible for replenishing keys where needed and final removal of the key safe once all customers have moved in.

LGAH will endeavour to have a representative at each handover where possible. LGAH Customer Care Team will be in close liaison with its partners to co-ordinate handover between all teams to ensure a seamless service for the customer.

## **7 Home Demonstrations**

In addition to viewings, home demonstrations are an integral part of an onboarding experience. LGAH will conduct home demonstrations for all shared owners and this will be conducted by its Customer Care Team who will book in a specific appointment with the customer.

This will involve a detailed demonstration of all aspects of the home room-by-room, including how to programme hot water and heating and what to expect when living in a new build home, such as small cracks due to move movement and the drying out process. At this stage, the Customer Care Team will also highlight any planning or legal covenants which are specific to a scheme.

## **8 Inventories**

Inventories form an important part of property handover. For every new letting, LGAH expect its Management Provider to complete an inventory which provides a clear record of the condition of the property at move in. The process for carrying out inventories is at the discretion of the Management Provider but should, wherever possible, include photographic evidence

alongside any general descriptions so a thorough and accurate account is recorded against each new let.

## 9 Customer Documentation

There are a number of essential documents which must be given to customers when they take possession of their property:

- Property H&S compliance, instructions, and warranties
- Home User Guide
- Tenancy or lease agreement
- Privacy Notice
- CORE form
- Gifting of items
- LGAH welcome booklet and/or MP Welcome letter
- Meter readings
- Confirmation of keys

There will also be other documents which will be given to the customer as part of their ongoing housing management functions. These should be dual branded where possible.

## 10 Post Move In

### Settling-In Checks

Checking customers feel settled in their new home is an essential part to end the onboarding journey.

The first 12 months of moving-in is an opportunity to ensure all customers feel settled and supported as they are getting used to living in their new home, and the complexities of adjusting to a new build property.

For all customers, LGAH's Customer Care Team will contact each customer directly within 5 days of moving in to pick up any immediate questions they have and ensure there are no major issues. This will also be a good chance to confirm key contact information.

After this initial check-in, for rented homes ,LGAH's Management Providers will be responsible for ongoing checks within the first 12 months of moving in.

For shared owners, they will receive a welcome email at completion to confirm contact details for their Management Provider who will take over day-to-day management for the property and will be the main point of contact.

LGAH will also send all customers a survey at their 12 month anniversary of moving in. This is to gauge their overall experience within the first year, and if there are any service areas which LGAH or its Management Providers need to focus on and improve.

### LGAH Customer Care Team

Will be there to support the customer and Management Provider where there are concerns that the customer is not quite settled. This will include understanding what measures are being put in place to maximise ensure the customer is beginning to feel settled and this may include direct check-ins with the customer throughout their tenancy journey to ensure LGAH Customer Offer is being delivered as expected.

### Quality Assurance

LGAH will quality assure the onboarding of customers through three key metrics. This is to ensure value of service is being delivered to customers, and to help learn and develop the onboarding experience. This will include:

- New letting surveys – NPS scores across overall experience, quality of home and onboarding. LGAH will ask new customers to complete an online surveys within 30 days of moving in. Results will be shared across internal teams and the relevant MP to understand areas of improvement or aspects which were done really well and should be highlighted.
- Customer First – LGAH has developed its mindset and behaviour standards to help compliment service delivery for customers. This will be launched to its MP's with regular check-ins via the Customer Care Team to see how these are being delivered during customer move-ins and ongoing housing management
- Complaint handling – As part of post move-in experience, how LGAH and its MP's manage customer issues is important. This will range from defects, problems with service delivery and managing expectations. LGAH will assess complaint feedback and resolution as part of overall customer assurance.

In addition, LGAH will develop its property handover accreditation which will allow a range of internal staff to facilitate handovers where required.

## 12 Equality and Diversity

LGAH considers the diverse needs of its customers when delivering landlord services. We expect all employees, and partners working on behalf of LGAH, to treat all customers with fairness and respect.

The specific needs of customers are considered when delivering services against this policy and at times this may require taking a different approach to ensure customers are not disadvantaged due to their diverse needs. This will include utilising information LGAH holds about its customers and tailoring how customers are to communicate and engage with LGAH services to eliminate any barriers for access and reporting.

## 13 Related Documents

Document	Link
Connected policies and procedures:	<ul style="list-style-type: none"> <li>• Allocation Policy</li> <li>• Affordability Policy</li> <li>• Defects Management Policy</li> <li>• LGAH Handover process and checklist</li> </ul>

Accountable Director	Shaun Holdcroft
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