

Customer Profiling Policy

Date written: October 2009

Date of last review: April 2023

Purpose: To set out Bernicia's approach to the collection and use of customer profile information

Scope: Bernicia Customers

Definitions:

Customer – Bernicia Housing's tenants, future tenants, and leaseholders

Profiling – the collecting, analysing, and grouping of information about our tenants (current and future) to provide a detailed picture of their characteristics, including demographics, needs and behaviours, attitudes, lifestyles, and aspirations.

Insight – the use of profiling information to develop a comprehensive knowledge and understanding of relevant aspects of our tenants' behaviours, beliefs, needs, desires, and aspirations so that how you communicate with them and the services you design, and deliver are aligned to their needs and expectations.

Associated documents:

Confidentiality Policy
Data Quality Policy
Bernicia Data Protection Policy
Bernicia Privacy Guide

Date for review: May 2026

Responsibility: Head of Service (Customer Engagement and Business Intelligence)

Policy

1. Introduction

- 1.1 Bernicia aims to provide quality, customer focussed services which offer value for money and make the difference to its customers.
- 1.2 Having an insight into our customers (Existing and potential) and their needs can bring advantages to both the organisation, services and to customers:
 - Communication can be tailored to the specific requirements of customers and targeted on basis of need and potential eligibility
 - Support can be made available to customers as identified from stated requirements
 - Identification of non-users of services can help identify how service provision can be extended to hard to reach and disaffected customers
 - Services and resources can be made available to individuals and communities in the right place at the right time
 - Bernicia can benchmark and share good practice
 - Services can be tailored to meet the needs of customer
 - Barriers to access services can be reduced or removed.

2. Policy statements

- 2.1 Bernicia aims to collect 100% of customer profile information
- 2.2 Based on best practice we will ask customers to provide their details about a variety of aspects of themselves and their households which can include:
 - Gender
 - Age
 - Disability
 - Ethnic Origin
 - Nationality
 - Household income
 - Communication needs
 - Communication preferences
- 2.3 We will collect profile information using a variety of methods, and from time to time we will undertake specific activities to improve the information we hold about our customers. All customers have the right to refuse to answer questions, as they see fit.
- 2.4 We will use customer information for segmentation analysis of the customer base to inform policy and procedure, along with the ability to

create tailor-made services based on customer needs. Providing relevant information to customers based on their characteristics to positively affect their experience with Bernicia.

2.5 We will undertake regular reviews of customer information held to ensure the accuracy of the data we hold.

2.6 Large scale survey of our tenants and residents, undertaken and the anonymised profile information collected provides us with a benchmark against which we can test assumptions made based on customer profile information held.

2.7 Confidentiality

All personal information collected, including personal sensitive information, will be stored, and processed in accordance with the Data Protection requirements and in line with Bernicia's own policies and procedures.

Bernicia's approach to our privacy practices are set out in a Privacy Guide available on our website and on request.

2.8 Output data is saved on a customer's unique record on secure housing systems accessed by two factor authentication by approved users of the system.

3. Responsibility for implementation

3.1 All colleagues are responsible for requesting and accurately recording profile information.

3.2 Directors across the group are responsible for ensuring, profile information is gathered in accordance with this policy and associated appendices.

4. Actioning the policy

4.1 This policy will be actioned whenever there is a requirement to capture profile information.

5. Monitoring the policy

5.1 The Board of Bernicia will monitor the progress of the customer profiling programme, as well as ensuring that this policy is adhered to.

6. Resources

- 6.1 There are no resource implications as a consequence of this policy. However data gathering initiatives may require that additional staff hours be made available.

7. Equality and Diversity

- 7.1 An equality and diversity impact assessment has been undertaken on this policy. In carrying out our services, we are committed to:
- Treating all customers equally regardless of any personal characteristics.
 - Taking seriously all complaints alleging inequality of access or treatment based upon personal characteristics and to investigate and respond accordingly.
 - Providing clear and simple information that is available in other formats on request.
- 7.2 The implementation of this policy should have a positive impact on individuals who identify characteristics defined in the profiling categories.

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