



Customer Case File:

The Trials of Mrs Tranter

November 2026

This is a fictional case created for training purposes based on examples from real cases.
All names and personal details have been changed.



URGENT

Please read me before you start



19 November 2026

Hi team,

I need your help.

Mrs Tranter, one of our customers, had a negative experience with us which has ended with a complaint which was upheld by the Housing Ombudsman.

We've seen some fairly negative reporting in the media since and I need you to work together to figure out what happened and why for Board to review ASAP.

I've quickly pulled together what evidence I have in this folder for you. Sorry, it's probably not perfect or in order, so you'll probably need to look at a timeline of events as a starter.

Here's what I need you to do:

1. Review the evidence and document our points of failure in the case. By this I mean the significant things that we did or didn't do which didn't follow our processes or where we didn't think about customer experience.
2. Work out where we didn't live by our Magna values. We all need to consider the impact of our actions, whether we're speaking to customers directly or not. We can't create better futures unless we get this right.

I've also just received the Housing Ombudsman's draft report on the case – this is included in the envelope you'll find inside.

But please don't open the envelope until you've finished! Once you've recorded everything you can on the case, then you can check them against the Ombudsman's report. It's really important to see if we as a team can get to the bottom of what went wrong and learn from it to make sure this doesn't happen again.

When you've finished, I'd love to hear your thoughts, so do reflect together on what it felt like to work through a case like this. Do capture how you see your team or group might help to avoid cases like this in future and create more positive impact on the customer.

I've popped a sheet inside for you to note down your answers and reckon it should take about 60 minutes.

Look forward to catching up soon.

Pritti

Pritti Singh
Head of Customer Experience

If you need digital versions of anything you can find them here: <https://bit.ly/4houkAB>. You'll also find some of our policies and procedures to reference too.

