

To: UC Programme Board Members **From:** s40
Sponsor: Paul Mckeown
Author: s40
Date: 25 June 2019

Channel Shift Strategy - Telephony

Issue:

To update Programme Board on the Channel & Contact Strategy work;
Focusing on Telephony.
Recommendations;

Recommendations/Decisions required:

- For Programme Board to understand the current and future position of Telephony / main work areas of focus / discuss recommendations.

Timing: June 2019 Programme Board.

Integrated Telephony shows improvements as a result of supportive activity.
There is a new design for the National Telephony tier, structure and resourcing.
We have received improved summer 2019 telephone forecasts from UCAD.

Introduction

1. Headlines

Previously the Programme Updated Programme Board of the main areas we are focusing on in the Contact Strategy – this paper is covering the work undertaken on telephony.

Two of the top 4 reasons for call we are experiencing on Integrated telephony includes payment queries and calls about advances.

Programme Board were informed in March of some of the Statement enhancement features planned to provide claimants with clearer messaging for date of receipt of payment and overall more detail about advances.

Specific enhancements to Statements went live on 15th May 2019 - helping to set expectations around when claimants will be paid after they have claimed, and improving the layout and information to make the statement clearer.

Clearer and more detailed information about Advances is planned on 26th June 2019.

Although too early to robustly attribute to the Statement changes, the past 3 weeks has shown some signs that these changes may have had an effect on telephony contact. In particular, overall call volumes and calls / case manager have reduced.

From 8th April – 31st May, headline figures have shown

Average of 15% fall in integrated call volumes
Average of 16% fall in calls per Case Manager per week
7% rise in overall caseload from 1.96M – 2.1M

However, we are continuing to monitor MI and data across telephony, looking at volumes, ratios of calls and trends.

Additionally, there is work underway to refine the way we measure calls per Case Manager per week.

2. What we have been doing – Activity breakdown

Theme

Reason for Call: Payment queries.

Approx 40% of the calls either payment had been made or at least partially made.

Activity:

Statement changes on the service in Mid-May 2019.

Clearer messaging / expectation setting for claimants detailing date when statement will be and specific date when payment will be made.

Impact

Currently monitoring call type volumes to track the impact this has had.

This will allow for forecasting those types of calls, and reduction thereof.

Theme

Reason for Call: Advances

Sample of calls showed (53%) were to do with Budgeting Advances and (19%) were ineligible advances.

This compares to 89 (18.5%) which were New Claim advances.

Activity

Statement changes expected 26th June to include more detail about existing advances & repayment schedules and balances.

Impact

We are monitoring overall call type volumes to see reductions in advance queries.

Theme

Call routing - Revised Call Plan

Activity

Simplify the customer journey, introduce forced listen to improve orientation, improve online signposting and match rates by moving the caller identification to the earliest opportunity in the call plan.

Impact

We have seen an increase in valid calls being routed to New Style Employment & Support Allowance. We have seen a major reduction in callers selecting no option, circa 9,000 and a minor reduction in abandoned calls.

There has been an increase of 1% in match rate, compared to the average of the previous 4 weeks.

Theme

Effective Handling - Consistency of service - PB Recommendation 1.

Activity

'Ready Together': Collaboration across Programme, Service Design and Transformation, Operational Centre, Service Performance and Optimisation, Service Design and Transformation and Operational colleagues to provide the service centre design principles across the network.

Impact

Targeted support in Canterbury, Walsall and Stockport has shown performance improvements through gaining equity of colleague's availability and optimising team size. Reduce variation across sites, in depth sessions enabling sites to better understand where their efforts should be focussed to optimise performance and use of supporting MI products. Tracking trends and telephony performance/behaviours and drawing out recommendations.

Theme

Trials: Consistency of Service

Activity

Removal of site level routing to improve call matching, assess case management metrics, and understand impact on national telephony demand.

Impact

Evaluation from the initial 4-week period highlighted that case manager feedback was positive and agent time to perform case management activity increased. Average Handling Time decreased from 8min 30 sec to 8min 10sec, calls per agent dropped from 10.52 per day to 10.05per day, whilst caseloads increased from average of 402 to 447.

Establishing the test environment for Bolton SC to run Site Level Routing test within next couple of weeks. Derby and Canterbury Service Centre to follow.

Theme

Reason for Call – Better understanding for known reasons for call.

Activity

Broaden the usage of Channel Analysis Tool across the wider Service Centre network. Allow a deeper understanding of the reasons why claimants call.

Impact

Have a wider data set to enable to understand on-going reasons for contact. To support and increase our understanding of why claimants call.

Organisation / Structure

Currently the national services (telephony and inbox) are being delivered from eleven sites. Between now and March 2020 this will reduce this to six National Service Hubs. These will be Stratford, Belfast, Bristol Flowers Hill, Wolverhampton, Glasgow Milton, and Middlesbrough.

The selection of these sites was based on them being of a suitable size to deliver national requirements, while providing an equitable workload across the country and maintaining where possible the integrity of geographical alignment. The transition period of these National Service Hubs will be determined on a site-by-site basis as existing caseloads are realigned to other service centres. Line Management of colleagues working within the National Service Hubs will remain under each Area Director as now, providing clear accountability for the experience and wellbeing of colleagues in their geography, but there will be a lead Group Director and dedicated Service Leader* who will in future have central accountability for National Services, providing central leadership and service ownership.

*Colin Stewart: North Group Director Lead / Karen Lee NW Director

*TBC : G6 Service Leader

3. Forecasts

Provisional forecasts have been produced and received from UCAD that show the following trajectories for integrated and National telephony call volumes. These volumes are indicative baseline numbers but show the potential increase in telephony.

Annex 1: 2018 v 2019 forecast and actuals to Jan 22.

New Summer 2019 forecast shows the reduced baseline and how this compares to the Summer 2018 trajectories.

Actual calls are tracking against the new forecast however analytical scrutiny is required through the relevant governance board.

Annex 2 : Total & Integrated Telephony forecasts 19/20

New forecasts to show total calls and integrated call forecast with actual call tracking against.

Improvement activity as indicated in paper will be fed into re-modelling of forecasts once evidence and impact of improvements are fully measured and understood

Annex 3 : Total & Integrated Telephony Forecasts to Mar 24.

New forecasts to show the trajectory of total and integrated calls.

Summer '18 v Summer '19 forecast

4. Areas of focus

Reasons for Contact: Opportunities to have more consistent and effective method to understand our reasons form contact.

- Channel Analytical Tool: Expansion of use across the SC network being planned.
- Verint – Discovery work to understand the capability to enable us to understand call reason and the voice analytics team.
- GIA – Exploring functionality / capability to allow themes and reasons for call.

Test & Trials

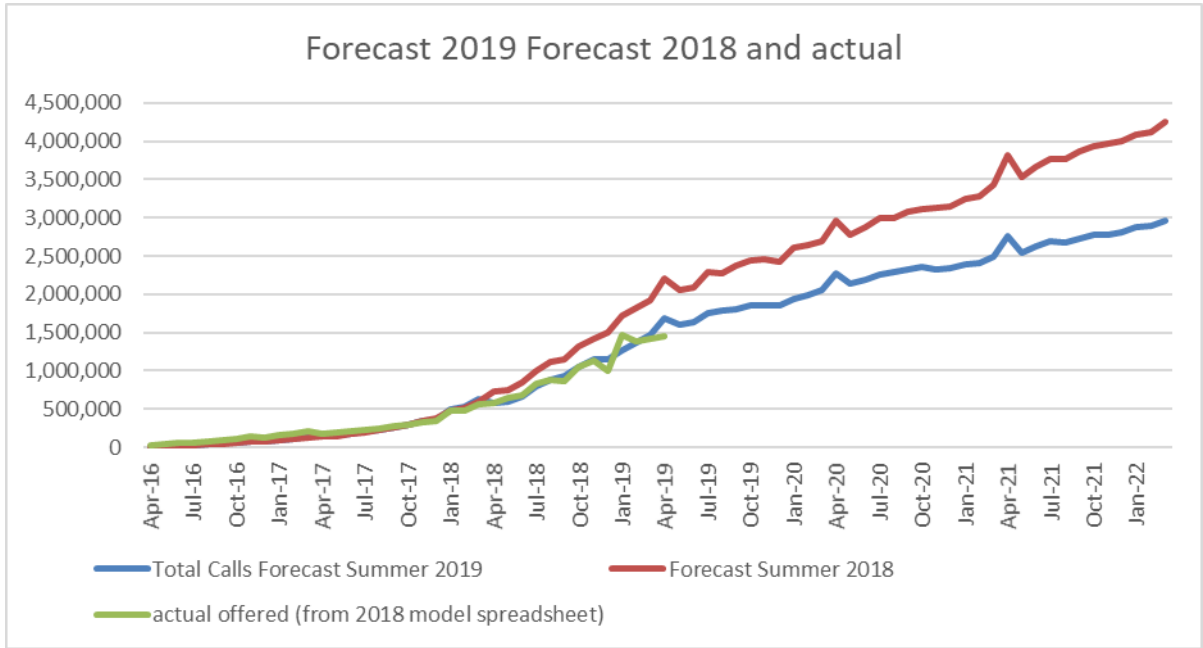
- Expansion of site level routing test.
- Designing a test to reduce telephony hours – allow Case Managers more time to focus on Case Management.

5. Ask of Board Members

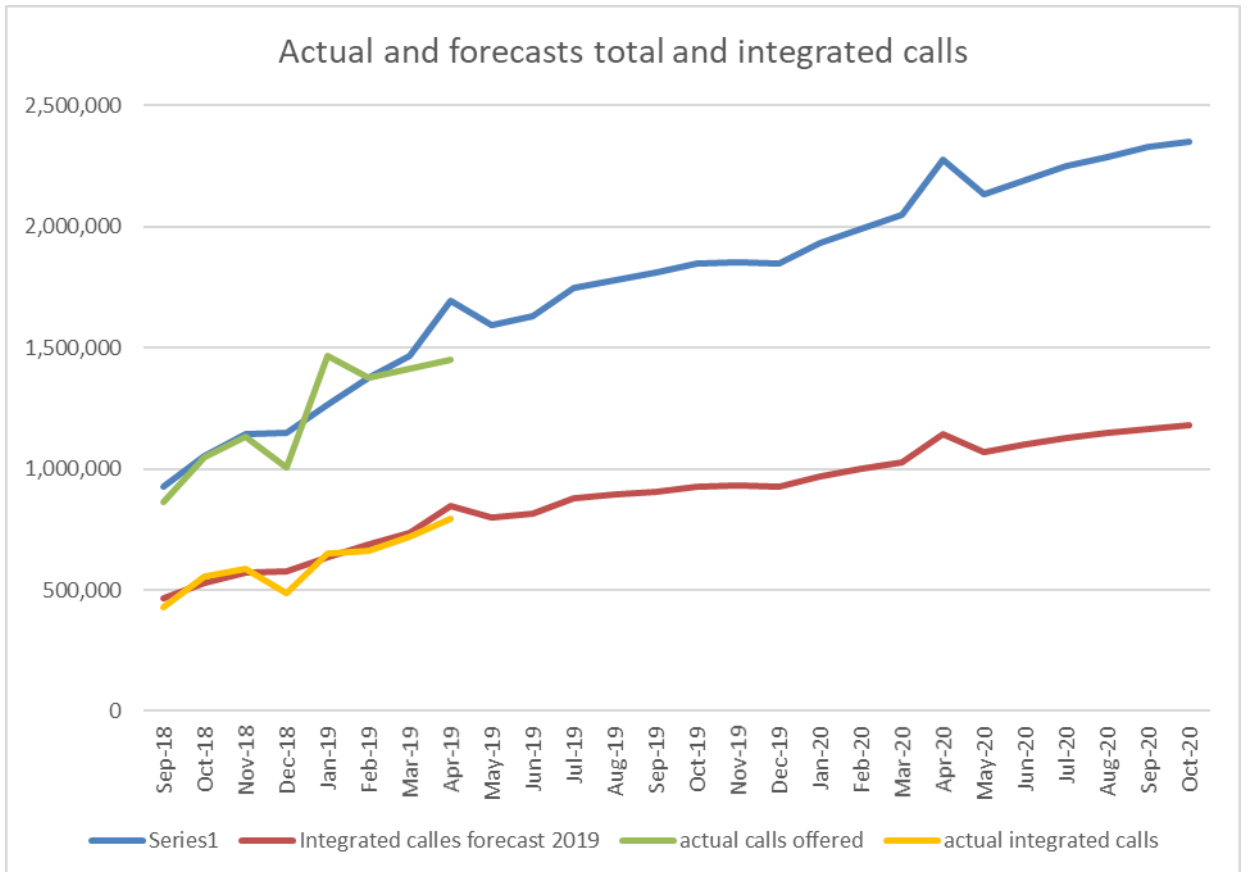
- Note the activity and work undertaken to understand the impact on contact type and volumes.
- Note progress on testing Site Level Routing – and planned expansion to Derby Service Centre.
- Note the new forecasts and requirement for more impacting as evidence of improvement activity is fully understood.

Annexes

Annex 1



Annex 2



Annex 3

