



## Research report

# Processing Customer Relationship Manager Pilot Evaluation

Delivering a better service to agents

**Business Customer Unit**

**Her Majesty's Revenue and Customs Research Report Number 121**

*Behavioural Evidence and Insight Team  
part of the HMRC Customer Units*

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## CRM evaluation

### *About the Business Customer Unit (BCU)*

Business Customer Unit (BCU) is part of Business Tax responsible for ensuring businesses pay the right amount of tax whilst improving our customer's experience and the overall UK business environment.

The BCU role is to help colleagues make customer focus a reality by understanding our Business Customers needs better and using that understanding to design better products, processes and service delivery.

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### *Research requirement (background to the project)*

03/02/11

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## CRM evaluation

HMRC is committed to improving the experience of all its customers, including agents and employers, via a wide range of initiatives. Several initiatives have been piloted including an Agent Dedicated Line (ADL) and Agent Account Managers (AAMs). These initiatives were evaluated earlier in 2008.

This project is an evaluation of a further initiative: Processing Customer Relations Managers (PCRM). Processing CRMs have a dual role: as relationship managers for agents, and as Processing Account Managers for the group of large employers who belong to the Taxpayer Data Standards Forum (TDSF). This latter role requires working in partnership with existing account managers in the Large Business Service (LBS) and Local Compliance (LC).

### *Who did the work (research agency)*

The Agency selected to do the work was Truth Consulting Ltd.

### *When the research took place*

The research took place during October and November 2008.

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CRM evaluation

***Method, Data and Tools used, Sample***

Face to Face qualitative interviews were conducted with the 5 Processing CRMs and their internal and external clients.

<b>Role</b>	<b>Number of interviews</b>	<b>Method</b>
Processing CRM	5	face-to-face
LBS CRM	5	face-to-face
LC CRM	3	face-to-face
ECTS	5	face-to-face
TDSF employers	10	8 face-to-face/ 2 telephone
Project manager	1	telephone
Taxpayer Data Standards Forum Secretariat	1	telephone
Agents	25	telephone

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## CRM evaluation

### *Main Findings: General*

#### **Overview of the Processing CRM Role**

Current PCRMs enjoy the dual nature of the role. They estimate that 20% of their time is spent on servicing processing issues for TDSF employers. The remaining 80% is spent on servicing agents with their processing enquiries. Each PCRm is available to 1,000 specific agents, though only 1 in 5 are currently 'active', i.e. using the service. (Source: HMRC MIS data).

PCRMs perceive the most important part of their role to be to identify and address recurring issues, in order to improve ongoing efficiency.

#### **Capacity Levels**

PCRMs themselves say their roles are 'at capacity', and despite peaks and troughs they are busy, and the role can be stressful at times. However the dedicated TDSF teams are satisfied with the speed and service level delivered, this may suggest the role could be somewhat below full capacity. Project managers believe the role has not reached its full potential or capacity, due to currently low Agent call rates (between 2 and 20 per week, based on MIS data)

#### **PCRMs: Concerns and Frustrations**

Calls from 'angry' agents is perhaps an inevitable concern of PCRMs. While they feel they should always be available for agents, TDSF queries often affect hundreds of employees and tend to take priority.

A further frustration is that the agent call traffic is unpredictable, and seasonal patterns have not yet emerged.

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## CRM evaluation

### *Main Findings: TDSF*

#### **TDSF Employers' Usage of HMRC**

TDSF employers have four 'official' main routes of communication with HMRC:

- LBS (Large Business Service) CRM or LC (Local Compliance) CRM: these are used for complex compliance issues, and overall account management
- ECTS (Employer Compliance Tax Specialist) for tax enquiries
- Processing CRM – complex processing issues
- Employer Help Lines – simple or first stage enquiries

The weakest part of this provision is perceived to be help lines. Other channels, including PCRMs, are highly regarded. However, many TDSF employers continue to use informal or 'back-door' contacts within HMRC.

#### **Internal Integration**

PCRMs are not currently part of the TDSF client-facing team. The roles of PCRm and compliance is quite clearly delineated by all, employers included, therefore little internal contact is necessary.

### *Main Findings: Agents*

#### **Needs of Agents**

Agents claim to have a simple need: a reliable name and contact number, which they will use only after exhausting all other channels. They expect reassurance and resolution. There is little confidence in call centres, and the online system is also criticised.

#### **Agents' Views of PCRMs**

Agents very much welcome the role. The expectation is more than a concierge service, rather someone who can intervene to make things happen. Processing and compliance are not separate issues for agents, and PCRMs are able to handle both.

#### **AAM and PCRMs: Similarities and Differences**

Before the PCRm initiative was piloted, a similar pilot was run of Agent Account Managers (AAMs). AAMs had a smaller number of agents to service, in a more proactive role.

Both roles are welcomed by agents. Agents believe the roles are similar in some ways, but the key differences are summarised below:

## CRM evaluation

### Similarities and differences of the AAM and Processing CRM role

#### Similarities

##### Processing CRM/ AAM

- Serve Agents
- Point of contact after exhausting other channels
- Handle mainly processing issues but also compliance issues
- HO grade

#### Differences

##### Processing CRM

- Serve average 1000 agents
- Reactive
- Average of 30 years service allows for greater experience in finding the right person in the relevant department
- Attend forums
- Agents aware through letter, website, forums and escalation



##### Agent Account Manager

- Serve average 100+ agents (40 at time of research in Feb 2008)
- Proactive
- A more personalised role
- Strong educational role
- Heavily involved in forums
- Agents aware through letter, website, forums and escalation but **also** personalised visits

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