Accessing Jobcentre Plus Customer Services: a qualitative study

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Acknowledgements

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Summary

Introduction

In recent years Jobcentre Plus has introduced a number of initiatives to improve the delivery of services to customers. There has been a rapid expansion in the use of telephony and web-based services, and so the number of 'channels' through which people can access Jobcentre Plus services has increased. The Accessing Jobcentre Plus Customer Services (AJCS) model was introduced into offices to help deal with rising levels of unappointed footfall and to help customers utilise the service channel that best meets their needs.

This evaluation provides early feedback following the national roll-out and examines whether AJCS is operating as intended.

The evaluation focused on ten Jobcentre Plus local offices and their associated Benefit Delivery Centres (BDCs) and involved: observational studies and in-depth face-to-face staff interviews in the selected Jobcentre Plus local offices; telephone interviews with staff in the five BDCs; and a focus group with the National Jobcentre Plus Customer Representative Group Forum (hereafter referred to as customer representatives).

The local Jobcentre Plus office

Staff awareness of aims of AJCS and understanding of roles

• Notwithstanding initial concerns, staff said that the roll-out of AJCS had been largely successful, including the guidance and training provided. Staff perceptions of why AJCS was introduced and the purpose of the new approach were generally aligned with Jobcentre Plus' policy intentions. Although the reasons staff gave varied, they all focused on improving customers' contacts with Jobcentre Plus.

• Customer representatives, however, felt that the training had not equipped Jobcentre Plus staff to provide the best service to all customers, for instance, it did not fully equip staff to deal effectively with all types of disability issues.

- Jobcentre Plus local office staff reported that, in general, customers were now using the most appropriate channels to resolve their enquiries. In fact, some staff suggested that customers preferred being able to contact the relevant teams, for example, BDCs, directly. However, staff also said that some customers who were able to use the self-service facilities nevertheless requested face-to-face assistance with their enquiry.

- Older people, people with English as a second language and people without prior experience with Jobcentre Plus services were given as examples of customers who needed to be encouraged by staff to use the self-service facilities. This evaluation, however, did not include interviewing customers directly, and so customers' responses to the self-service channels are not fully known.

Footfall in local offices

- The design of the evaluation, in particular the absence of a comparison where AJCS had not been introduced, makes it impossible to estimate the effect of AJCS on the level of unappointed footfall in local offices. Additionally, the increase in the number of people entering local offices due to the economic downturn made it difficult for staff to identify the effects of the introduction of AJCS conclusively.

- Nevertheless, some staff believed that the introduction of AJCS meant that the increase in customer volumes was made manageable.

- There was variation in how local offices manage footfall. Some offices' Customer Care Officers tried to control the volume of customers in the forum area by only allowing entrance to those with appointments, and staff in some local offices denied access to family and friends accompanying customers to make the forum area more manageable. This departs from AJCS, which although it aims to encourage customers to make appointments, does not remove the availability of face-to-face assistance without an appointment or access to self-service facilities by members of the public.

- Customer representatives said that by discouraging customers from going into local offices, Jobcentre Plus had made their services less accessible for those customers who were not aware of the process or did not feel comfortable contacting the BDC directly.

Health and safety

- Many forum area staff felt that the changes to health and safety management under AJCS had been positive. Staff thought that the more proactive role of Customer Care Officers was an important factor in the speedy and effective identification and management of risks.

- Staff assessments of the impact of AJCS on incidents varied across local offices. Reasons identified as potentially limiting or reducing the number of incidents were that queuing times had reduced and customers were handed on to the relevant agencies quickly. However, others said that handing on customers to the BDC could be a cause of tension, as was customer frustration with waiting times, delays and uncertainty about whether customers would receive payment.

Vulnerable customers

- The approach to identifying vulnerable (or priority need) customers varied across offices. Staff tended to use a combination of Jobcentre Plus guidelines and their own judgement when identifying vulnerable customers.

- On the whole, forum area staff felt relatively confident that customers with priority needs were being identified successfully and their needs met under AJCS.

- Some Customer Service Managers (CSMs) said that in most cases they were expected to determine vulnerability in less than one minute. In practice, the length of time taken for interactions with customers was more flexible.

- Customer representatives felt that Jobcentre Plus staff's interpretation of what is a priority need varied substantially across offices; that staff were often insufficiently trained to identify any but the most obvious cases; that staff were not sufficiently trained to deliver a service to all vulnerable customers; and that too many people with perceived priority needs were being referred to advice agencies when a solution could be found within Jobcentre Plus local offices.

Jobsearch

- Staff said that it was difficult to gauge the effect of AJCS on jobsearch due to rapidly rising unemployment and limited job opportunities following the economic downturn.

- Some staff said that by dealing with customer enquiries as efficiently and effectively as possible and encouraging those customers who were able to use self-service facilities to contact the relevant bodies directly, they were able to focus on jobsearch.

- On the other hand some staff said that the introduction of AJCS has had a negative effect on jobsearch as once the customer's enquiry had been dealt with there was often insufficient time to promote jobsearch.

- Customer representatives said that jobsearch was not always effectively supported or in some cases is promoted inappropriately to vulnerable customers who might not be 'job-ready' and that sometimes customers were being refused access to jobsearch facilities by Customer Care Officers.

The Benefit Delivery Centre

- BDC staff felt that whilst the information they had been given in how to deal with customer enquiries under AJCS had been satisfactory, they would benefit from further training in the benefits system as a whole.

- Staff said that the majority of enquiries to BDCs are resolved without an appointment at a local office being made for the customer either in the local office or elsewhere; and that they aimed to resolve between 70 and 80 per cent of the requests they received from customers.

- However, customer representatives said that whilst BDC telephony staff were able to deal with straightforward queries, customers with more complex enquiries might find it hard to receive an adequate response from telephony staff.

- The use of the 0845 number by Jobcentre Plus for calls to the BDC was raised as an issue by local office staff, customer representatives and BDC staff.

- Customer representatives said that for their customers the call-back target time of three hours was rarely met and was frustrating for some customers.

- Staff said that there are instances where customers had been passed between local offices and BDCs a number of times before their enquiry was dealt with.

Conclusions

From the perspective of Jobcentre Plus, AJCS has met a number of its policy objectives. Thus, Jobcentre Plus local office staff said that they believed that in general customers were using the most appropriate channels to resolve their enquiries. Although older people, people with English as a second language and people without prior experience with Jobcentre Plus services were given as examples of customers who needed to be encouraged by staff to use the self-service facilities. In addition, some staff said that AJCS has helped with the management of unappointed footfall – that the increase in customers during the economic downturn would have been unmanageable without the introduction of AJCS. However, customer representatives were less positive about AJCS, and reported how, in particular, vulnerable customers and those with complex circumstances could find the system difficult to navigate.

AJCS was designed to encourage a standardised delivery of service across local offices, and in some areas AJCS has introduced a degree of standardisation; for example, local office staff now offered less face-to-face support to customers and focused primarily on supporting vulnerable customers. Additionally, forum area staff said that they were redirecting more customers to self-service facilities since the introduction of AJCS.

However, there was also variation in how AJCS had been implemented across offices, for example, in the management of unappointed footfall, with some Customer Care Officers in local offices limiting, for health and safety reasons, access to the office, which could result in customers being refused access to jobsearch facilities.

The approach to identifying vulnerable customers also varied across offices. Staff in local offices and BDCs used a combination of Jobcentre Plus guidance and their own experience to identify the most appropriate way of meeting customers' needs. However, past experience of a customer is not necessarily a reliable indicator of whether or not they are currently in priority need. Indeed, the reliance on staff experience and judgement to identify vulnerable customers might overlook customers with vulnerabilities that are not immediately apparent. The current approach used by Jobcentre Plus staff risks both customers who were vulnerable not being identified and some people receiving assistance who do not need it. This and the practice in some offices of denying access to family and friends accompanying customers could potentially result in contravention of the Disability Discrimination Act.

Relations between BDCs and Jobcentre Plus office staff were raised as a cause of tension by both Jobcentre Plus local office staff and customer representatives. Issues identified include high staff turnover and available staff resources in BDCs, training provided to telephony teams, differences in terminology, and insufficient or inaccurate customer information in the shared diaries. Jobcentre Plus local office staff felt that these factors could lead to inconsistencies in the service provided to customers.

Furthermore, call waiting times for BDC telephony services and the use of an 0845 number were highlighted as examples of bad practice by customer representatives and Jobcentre Plus local office staff who argued that these often led to increased queues in local offices as customers would visit the office to avoid the cost of the call.

In general, staff were reasonably satisfied with how the scheme has been implemented, although some further training needs were identified.

Recommendations

The evaluation has identified areas where the system is working well and other areas where it is working less well. Jobcentre Plus should consider the following areas to improve service delivery to customers:

• Providing consistent public access to services across Jobcentre Plus local offices. This may involve reviewing the role and responsibilities of Customer Care Officers.

• The approach and associated staff guidance to identification of vulnerable customers; in particular, Jobcentre Plus should review how customers with 'invisible' priority needs might be assisted.

- Reviewing the relationship between local offices and BDCs; in particular call-waiting and call-back times; training of staff; and what information should be entered in to the shared diary.

- Reviewing the cost of calls incurred by customers to BDCs.

- Staff have had to deal with large numbers of customers with limited prior experience of Jobcentre Plus and this has put pressure on both staff resources and the facilities available. Jobcentre Plus could explore when and what information about Jobcentre Plus is made available to people when they are made redundant and how new customers are served.

- The increased volume of customers made it difficult to evaluate the impact of AJCS on the management and level of unappointed footfall within local offices. At least for a trial period, data on the number of vulnerable customers within local offices should be collected. To complement this evaluation, research with customers using AJCS should be commissioned in order to triangulate their views and experiences with the perceptions of staff and customer representatives.

1   Introduction

In recent years Jobcentre Plus has introduced a number of initiatives to improve the delivery of services to customers. There has been a rapid expansion in the use of telephony and web-based services, and so the number of 'channels' through which people can access Jobcentre Plus services has increased. Accessing Jobcentre Plus Customer Services (AJCS), a nationally rolled-out standardised model, was designed to improve the delivery of services to customers. The aim of the process is to help customers utilise the service channel that best meets their needs.

The International Centre for Public and Social Policy, University of Nottingham, in association with BMG Research was commissioned by Jobcentre Plus to conduct an evaluation of AJCS based on evidence from semi-structured interviews with Jobcentre Plus local office staff, members of Benefit Delivery Centre (BDC) telephony teams and focus group work with members of the National Jobcentre Plus Customer Representative Group Forum.

This report presents the findings of the evaluation. It is structured according to the stages of the AJCS process within the local office and the BDC; and gives an indication of the attitudes of Jobcentre Plus local office staff, BDC staff and third sector representatives towards AJCS as well some of the issues that arise at each stage.

This chapter outlines the background to the evaluation (Section 1.1), the research objectives (Section 1.2), and the research design and methodology used in the evaluation (Section 1.3). The report structure is outlined in Section 1.4.

1.1   Background

1.1.1   Jobcentre Plus customers

People who use Jobcentre Plus are a heterogeneous group in terms of socio-demographic characteristics, life events, and benefit and work histories. For some, accessing Jobcentre Plus is largely straightforward and unproblematic, but for others their initial contacts can occur at a stressful time following a major change in their lives such as redundancy, divorce or bereavement. As a consequence the levels of confidence and competence of customers varies: from those with 'high

confidence and competence' who place few demands on the service to those with 'low confidence and competence' who place major demands upon the service (Bailey and Pryes, 1996).[1]

There is a small body of research that has focused on customers' interactions with Jobcentre Plus and its predecessors. Reviews of this research are provided by Stafford (2003 and 2009) and Finn *et al.* (2008) and this report does not summarise this literature, instead some key findings relevant to this evaluation are highlighted below.

The most recent customer satisfaction survey of Jobcentre Plus customers shows that the majority are satisfied with the overall service they receive:

> *'The vast majority of Jobcentre Plus customers (80 per cent) reported that they were either 'satisfied' or 'very satisfied' with the overall service they received from Jobcentre Plus…It is clear, however, that a small minority (11 per cent) of customers feel 'fairly dissatisfied' or 'very dissatisfied' with the service.'*
>
> Johnson and Fidler (2008:19)

Of particular interest to this study is that a large majority (86 per cent) of those using at least one of three main channels: Jobpoints, Customer Access Points (also known as 'warm phones') and the Jobcentre Plus website, were (fairly or very) satisfied with these services (Johnson and Fidler, 2008:40). However, nearly a fifth of users reported problems with these services, such as the system being down or faulty, or the jobsearch criteria used did not find vacancies in the 'right' location or occupation (Johnson and Fidler, 2008:41). In addition, across the three channels the main reasons for non-use were: lack of awareness of the channel; the service did not accommodate the customer's physical or mental health needs; they did not know how to use the channel; and/or they did not need to use the channel. Lack of access to a computer was also a reason for not using the Jobcentre Plus website.

Other research relevant to this evaluation includes Stafford *et al.*'s 1997 study of customers' contacts with the (then) Benefits Agency. This study, although now dated, investigated the number and nature of the contacts customers had with the Benefits Agency, and in particular explored customers' unnecessary contacts with the Agency. It was in both the customers' and the Benefits Agency's interests to minimise unnecessary contacts. As Williams *et al.* observe:

> *'These unnecessary contacts can confound the system, slow down the service and waste or divert valuable time, money, effort and other resources.'*
>
> Williams *et al.* (1995:91)

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[1]   Although Bailey and Pryes (1996) is a qualitative study of 24 Income Support customers, their findings arguably apply to other customer types.

They can also add to a customer's sense of frustration with and alienation from the system (Stafford *et al.*, 1997).

Talbot *et al.*'s 2005 study of the Jobcentre Plus Customer Service Target provides an indication of some the tensions that staff may encounter in managing queues in local offices. The authors identify a potential trade-off between staff delivering an **individualised** service and a **collective** customer service (Talbot *et al.*, 2005:21-22). The former involves spending time with each user to establish their needs and provide a range of information, advice and support. The latter involves attempting to provide a service to all customers, dealing with their concerns quickly and minimising queues in the office. They found that an unintended consequence of the generic Customer Service Target was that the 'trade-off' favoured collective customer service delivery. Similar trade-offs may or may not be operating under AJCS.

1.1.2 The AJCS model

According to the Jobcentre Plus guidelines, AJCS was first introduced as **an operational response to address the levels of footfall in jobcentres** (Evaluation of the AJCS Test: 3) and as a means of assisting staff in identifying and dealing with vulnerable customers quickly and effectively. It is designed to ensure that customers without appointments are directed quickly and accurately through the most appropriate channel to resources best able to meet their needs. The model is designed to improve flow, increase jobsearch activity and reduce footfall. AJCS also has an educative role in that staff seek to educate customers to use the most appropriate channel when they next need to contact Jobcentre Plus.

Jobcentre Plus provides a number of contact options for customers. The method that is encouraged in most cases is to telephone the Contact Centre for new claims and the BDC for follow-up enquiries or to report changes of circumstances; post for customers who have difficulty using the telephone; and the internet (Jobcentre Plus and Directgov websites) for jobsearch and general and benefit-specific information. Jobcentre Plus believes that this choice is more convenient for customers who can now access services in different ways.

There are also a number of channels available for customers who wish to access services at local Jobcentre Plus offices. For example, customers can search for jobs through Digital TV and Jobpoints. Nevertheless, some customers may seek face-to-face support and advice. This may be either via an appointment or in a more ad hoc manner. The face-to-face channel is focused on priority areas to ensure that benefits are paid correctly and customers supported where appropriate and, in particular, customers who are identified as being vulnerable and who may have more complex needs are given additional help and support in understanding and accessing services.

Figure 1.1   The AJCS process
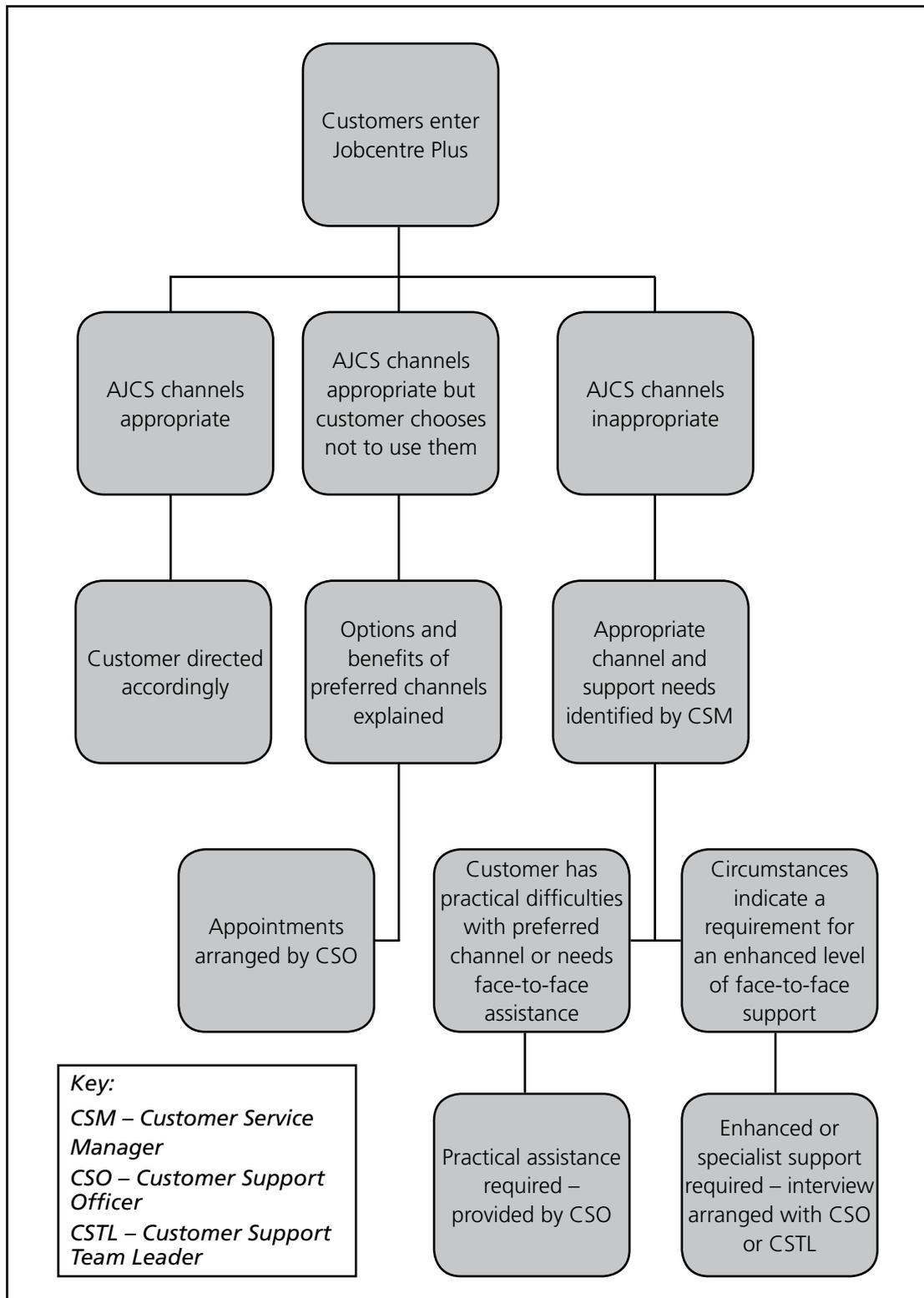
AJCS is a three-stage standardised model (see Figure 1.1). The AJCS model is designed to manage callers without appointments around a set of clearly defined mutually supportive job roles to ensure customers reach the right resources with a

minimum of delay (see Appendix A). At Stage 1, when the customer arrives at the Jobcentre Plus local office, she or he will be welcomed by the Customer Service Manager (CSM) who manages the office forum area and will signpost the customer to the correct areas within the local office. Customers with appointments will be directed to the Customer Support Officer (CSO) (Interviews). Some customers without appointments will be directed to Jobpoints whilst others will be identified as needing face-to-face support and be directed to the CSO (Appointments) who will then assess whether they need an appointment. The Customer Care Officer provides assistance in directing customers and intervenes, if necessary, to prevent inappropriate behaviour in the forum area or elsewhere.

At Stage 2 the CSO (Appointments) manages the Customer Support Appointment and Payment Diary for face-to-face appointments with the CSO (Interviews) and Customer Support Team Leader (CSTL). On referral from the CSM, the CSO (Appointments) handles more straightforward enquiries, copies documents, provides basic jobsearch advice, as well as additional support for vulnerable customers to access services, and identifies those customers who need an appointment with the CSO (Interviews) and, where complex intervention is appropriate, arranges an appointment and/or refers directly to the CSTL. (The CSTL manages the AJCS process in local offices.)

At Stage 3 customers are interviewed by the CSO (Interviews) whose main activities include identifying the specific support needs of vulnerable customers and linking to the appropriate expertise to meet those needs and, where necessary, acting as advocate.

Relationships between staff in local offices and the BDC are critical to AJCS. The BDC telephony team handles telephone enquiries from customers and either respond to straightforward enquiries themselves or refer to appropriate teams within the BDC or make an appointment using the shared diary with CSOs (Interviews) at the local Jobcentre Plus office.

1.2   Research objectives

The overarching aim of the research is to conduct an evaluation of AJCS to provide an up-to-date assessment of the extent to which the model is working as intended.

Specifically, the research aims to shed light on:

• whether customers are using the most appropriate service channel;

• if there has been an improvement in the management of unappointed footfall;

• whether AJCS has encouraged a standardised delivery of service across Jobcentre Plus;

• whether the roll-out (including the communications and guidance provided) was successful;

- how customers and staff have responded to the model; and

- examples of good and bad practice.

1.3   Evaluation design and methodology

The evaluation design was based on qualitative research with Jobcentre Plus staff complemented by an observational study of the AJCS process within the local Jobcentre Plus offices and a focus group with the National Jobcentre Plus Customer Representative Group Forum.

The evaluation focused on ten Jobcentre Plus offices located in five districts. The selection of the local offices/districts was undertaken in discussion with Jobcentre Plus. The sample included three districts involved in the trial of AJCS; one large office in Scotland; one small office in Scotland; one new-build site; one office without a forum area; and two sites with the highest number of health and safety issues outside London. All of the selected offices are where AJCS had reached a 'steady state' (as opposed to offices where it was still being embedded). (The roll-out of AJCS was being phased over the period April 2008 to July 2009.)

In general, other pilots and initiatives being conducted by Jobcentre Plus should not impact upon AJCS. However, Jobcentre Plus is piloting 'Jobtowers', which could affect the jobsearch aspect of AJCS. Accordingly, offices piloting this initiative were excluded from the evaluation.

1.3.1   Qualitative research with Jobcentre Plus staff and customer representatives

The evaluation involved:

- in-depth face-to-face interviews with managers and frontline staff in the ten local Jobcentre Plus offices;

- observational studies of staff and customers in the ten local offices as well as of the office environment;

- telephone interviews with staff in the five BDCs associated with the selected districts;

- focus group research with members of the National Jobcentre Plus Customer Representative Group Forum.

In-depth face-to-face interviews with frontline staff

Local office staff, depending upon the size of the office, can perform one or more job roles in AJCS. In the latter case, the individual was either interviewed twice using different topic guides or was interviewed for longer than the allocated interview time of 20 minutes in order to gain a full picture of each role. The interviews were recorded using digital voice recorders; but were not transcribed in order to meet reporting requirements. Interviewees were asked for their permission before the

interview was recorded. The majority consented but detailed notes were taken in those cases where the interviewee objected to being recorded but still consented to being interviewed. The total number of interviews by role is outlined in Table 1.1.

Jobcentre Plus provided contact details for each local Jobcentre Plus office in the sample. The sample was purposeful and respondents were selected by senior Jobcentre Plus staff. The offices were then contacted by members of the research team to arrange interviews and observational research.

Table 1.1   Number of achieved Jobcentre Plus local office staff roles covered in the face-to-face interviews

Role	Number of interviews per role
CSTL	8
CSO (Interviews)	3
CSO (Appointments)	3
CSO (Combined role)	7
CSM	8
CSM/CSTL (Combined role)	2
Customer Care Officers	10
Total 20-minute interviews	32
Total 40-minute interviews	9
Total interviews across sample	41

Observational studies

Observational research is a technique suited for studying specific settings or events, and so is highly suited to the focus of this research. It was decided that by observing the AJCS process within local Jobcentre Plus offices, a better understanding of the interactions between customers and staff would be gained.

For the purposes of this study, researchers assumed the role of observer-as-participant (Gold, 1958; see also Angrosino, 2007) where the researcher is known and recognisable but *'relates to the 'subjects' of study solely as a researcher'* (Angosino, 2007). In this way the researchers were able to fulfil the requirements of ethical social research (subjects are aware of their presence) but retained their objective role as they were not actively involved in the AJCS process. The observational studies were carried out by staff conducting the face-to-face interviews. Researchers observed the forum (or foyer) area in the selected Jobcentre Plus for four separate 30-minute periods.

Telephone interviews with BDC staff

The relationship between the local Jobcentre Plus office and its associated BDC is crucial and was also explored in the study. As BDCs are geographically dispersed, telephone interviews were conducted with staff involved with AJCS. Table 1.2 lists the staff that were interviewed, a total of 15 interviews were completed. The interviews were recorded.

Table 1.2   Achieved telephone interviews with staff in BDCs

Role	Number of interviews per BDC
Team Leader	1
Enquiry telephony team members	2
Total per office	**3**
Total interviews across sample	**15**

Focus group with the National Jobcentre Plus Customer Representative Group Forum

A focus group was held with seven representatives of the 13 member organisations of the National Jobcentre Plus Customer Representative Group Forum which meets monthly in London to discuss customer issues, in order to gather their experience of, and views on, AJCS. Customer representatives are themselves well informed about developments within Jobcentre Plus and had the opportunity to consult office level colleagues prior to the focus groups so that they could feed in their experiences. The focus group interview was recorded and transcribed to assist analysis.

In this report these respondents are referred to as 'customer representatives'.

1.3.2   Data analysis

The staff interviews and the observational studies were coded into a thematic analysis grid based around the themes and issues in the topic guides and pro forma. Each respondent was a separate row in the grid and each column was a specific (sub-) theme or issue. The cells recorded respondents' views and experiences; and in some instances these were recorded as verbatim quotes, some of which are included in this report. The grids allow comparisons and similarities in the data to be explored between staff performing similar roles. Sample sizes were insufficient to look for similarities and differences between each of the local office/BDC combinations, or to compare individual local offices and so these are not reported; but this also serves to help ensure the anonymity of staff respondents.

The themes explored in the analysis address the research objectives outlined in Section 1.2. In particular, participants' experiences are compared to what should happen under AJCS. The data from the observational studies provided valuable contextual information and helped in analysing individual respondent's experiences.

The evaluation design did not include a comparison site where AJCS was not being implemented (that is, a counterfactual), because it was a national scheme. Hence, this is not an impact evaluation; it does not provide a quantitative estimate of the effect of AJCS on, say, customer footfall in local Jobcentre Plus offices. It does, however, draw upon respondents' experiences and views of the effects of AJCS.

1.3   Report structure

Chapter 2 examines the operation of all three stages of AJCS in local offices, whilst Chapter 3 looks at the relationship between local offices and BDCs. Within each of these chapters the report is structured thematically. These themes reflect the research objectives: footfall; health and safety; vulnerable customers; and jobsearch. Each of these themes is discussed in terms of the reported behaviours and the perceptions of respondents based on the research findings from interviews, observational research and focus group with customer representatives. These two chapters also include a limited number of quotes from respondents, which to make them more readable have been 'smoothed'.

Chapter 4 presents the conclusions of the evaluation and a brief discussion of the key findings and recommendations.

The main AJCS roles of Jobcentre Plus local office staff are outlined in Appendix A.

The research instruments used (interview topic guides and observational proforma) are presented in Appendices B to D.

2 The local Jobcentre Plus office

2.1 Introduction

This chapter explores how the three stages of Accessing Jobcentre Plus Customer Services (AJCS) operated in Jobcentre Plus local offices (see Section 1.1.2), and it draws upon the observational studies, in-depth interviews with staff and the focus group with customer representatives (see Section 1.3).

Reflecting the policy intent of AJCS certain aspects (or themes) are discussed in turn below: staff awareness of AJCS and of their roles (Section 2.2); the level of footfall in local offices (Section 2.3); ensuring health and safety (Section 2.4); identifying vulnerable customers (Section 2.5); and conducting jobsearch (Section 2.6).

2.2 Staff awareness of aims of AJCS and understanding of roles

The evaluation explored staff perceptions of their role and how, if they had worked in Jobcentre Plus before AJCS was introduced, they felt this role had changed. This section discusses staff perceptions of why AJCS was introduced, their roles under AJCS (Section 2.2.1), the effects AJCS has had on the nature and content of their role (Section 2.2.2), staff interactions with customers (Section 2.2.3) and staff reactions to the introduction of AJCS (Section 2.2.4).

2.2.1 Staff understanding of AJCS and of their roles

Staff perceptions of why AJCS was introduced included:

- *'to keep footfall out of the office and get customers to deal with* [the] *Benefit Delivery Centre for benefits'* (Customer Support Officer);

- *'to manage queues'* (Customer Support Officer);

- *'to improve customer service'* (Customer Support Officer); and

- *'getting customers to do things for themselves'* (Customer Support Team Leader).

Although the reasons given varied, they all relate to, and focus on, improving customers' contacts with Jobcentre Plus.

In terms of their role within AJCS, no member of staff mentioned all of the responsibilities attributed to their role (see Appendix A), rather they tended to highlight particular aspects of the role.

Taking the main roles in turn shows that staffs' understanding of their roles varied. Customer Care Officers' (CSOs') perceptions of the role varied from office to office; and in some cases departed from the Jobcentre Plus guidelines. For example, some Customer Care Officers correctly stated that they ensured the safety of everyone in the building and directed people to the relevant services (see Appendix A). However, other Customer Care Officers appeared to play a more active role in dealing with customers than set out in Jobcentre Plus guidelines. For example, one Customer Care Officer explained how, in addition to his security duties, his role involved taking 'signing on cards' from customers and giving them to advisers. Another described how he prevented customers from using mobile telephones during appointments with CSOs, even though this level of intervention at Stage 2 of AJCS was not part of Customer Care Officers' role.

In general, Customer Service Managers' (CSMs') understanding of their role was in line with the guidance provided by Jobcentre Plus. CSMs said that the aim of their role was to ensure a steady flow of customers from their point of arrival to the appropriate channel. This involved identifying which customers required more help whilst directing customers who were able to manage their own enquiries to the appropriate self-service channels or to another part of Jobcentre Plus (for example, the Benefit Delivery Centre (BDC)), or to another agency.

The division of responsibilities between staff differed across offices. This was particularly the case for CSOs and CSTLs. In some offices the roles of CSO (Appointments) and CSO (Interviews) were combined or staff were also part of other teams within the local office. The combining of roles in this way could cause problems, for example, it might mean that there was insufficient time to perform both roles fully or other staff had to cover when the CSO was absent.

CSTLs could have different interpretations of their role. Whilst in some offices the CSTL's responsibilities largely involved overseeing the CSOs and monitoring trends, in others they played a more 'hands-on' role. For example, one CSTL stated that he dealt with more complex enquiries and controlled the Customer Support Appointment and Payments Diary – tasks that CSOs performed in other offices.

Most staff at Stages 2 and 3, that is CSOs and CSTLs, had a good understanding of their roles as defined by Jobcentre Plus guidelines.

Staff in offices where AJCS had been piloted, notwithstanding their longer acquaintance with the new system, did not have a greater understanding of the responsibilities of their roles than staff in other Jobcentre Plus offices.

2.2.2   Perceived effects of AJCS on staff role

The perceived effect of the introduction of AJCS on the nature and content of staff roles was mixed. However, it is unclear from staff accounts to what extent any reported changes were due to AJCS specifically or to a change in their role within the office or it was a response to recent increases in the volume and type of customer queries. Furthermore, a number of staff interviewed had started working at the local office only after AJCS had been implemented, and so they were unable to identify how their role had changed.

Staff said that the role of CSM had changed under AJCS. Previously CSMs had been used to taking customers through the process; as one CSM explained:

> *'There is now less involvement with the customer. There was a tendency in the past to sit down with the customer to try and ask their enquiry…The Customer Service Manager does not do this anymore and has to hand off.'*

> (Customer Service Manager)

Staff had different views about this new role for CSMs. Some staff saw this change as a positive step as CSMs were not trained in, for example, benefit enquiries, and by referring customers to the BDC, staff were able to ensure that customers speak to those with specialist knowledge of benefits. Nonetheless, some CSMs indicated that as a result of the change they had to deal with a wide range of possible topics, but lacked the detailed knowledge of their colleagues.

When asked how their role had changed since the introduction of AJCS, many Customer Care Officers said that, although AJCS had not directly affected their activities, they were now more involved in the business of the local Jobcentre Plus office. Some now attended team meetings and their greater understanding of what colleagues were trying to do was appreciated. One Customer Care Officer stated that changes in his role due to AJCS had allowed him to recognise customers who may present a problem:

> *'[AJCS] has let us know the customers themselves…the relationship we have with customers helps us to minimise the risk involved in the office. Whilst we are patrolling the floor we can identify whether these customers are going to kick off or not.'*

> (Customer Care Officer)

Some Customer Care Officers also said that their role had become more specific and less generalised.

However, a number of Customer Care Officers said that their role had become more 'hands-off' since the introduction of AJCS, with a greater focus on encouraging customers to use telephones (whether at Customer Access Points or at home)

rather than dealing with customers directly. This demonstrates the variation in the interpretation of specific job roles.

Stage 2 and 3 staff perceptions of how their role within Jobcentre Plus had changed since the introduction of AJCS also varied across offices. Whilst some CSOs (Interviews and Appointments) felt that the introduction of AJCS had significantly changed their role, others felt that, notwithstanding the new job title and introduction of shared diaries, the content of the support provided was the same. One CSO said that their responsibilities had not changed but the stage at which they came into contact with the customer had:

> '[My] *actual role has not changed immensely…I'm just now dealing with those who have appointments rather than those dropping in.'*

(Customer Support Officer – Interviews)

The main changes reported by staff at Stages 2 and 3 were the introduction of shared diaries, increased contact with other teams (notably BDC telephony teams), and clearer guidelines on how to deal with customers' enquiries and how long to spend with each customer.

2.2.3   Staff interactions with customers

AJCS was introduced to increase the focus on meeting the needs of Jobcentre Plus customers, including vulnerable customers, quickly and effectively in response to concerns that too much staff time was spent dealing with queries that could be dealt with by the customer themselves at the expense of customers who might require more assistance. In practice, how staff responded to queries from customers was influenced by a number of factors. These included the number of staff in the forum area, the volume of customer footfall (both appointed and unappointed) and the complexity of either the query or the needs of the customer.

Staff in the forum area had to deal with questions from customers who did not have a telephone or were not satisfied with the response they had received from the BDC via the Customer Access Points and requests for assistance from customers with English as a second language who were not comfortable using the self-service telephones. Staff also said that many of the customer enquiries they received in the forum area were connected to customer inexperience or a lack of knowledge of the systems in place. It was believed that customers who were new to Jobcentre Plus or were not aware of the processes in place were more likely to bring their enquiry to the CSM rather than go directly to the Customer Access Points. As the AJCS process only commences after the customer has entered the local office, it is not a shortcoming of AJCS if new or inexperienced customers did not know the process, rather it highlights the importance of the need to provide information to prospective customers before they access local offices.

Both Customer Care Officers and CSMs said that they normally aim to take the initiative with customers although different reasons were given for doing so. For example, whilst one CSM initiated contact in order to identify the correct channels

as quickly as possible, another spoke to customers as soon as they entered the Jobcentre Plus office in order to limit customers *'wandering'* and to ensure that they were in the office for appropriate reasons.

However, although staff said that they try to be as proactive as possible, some pointed out that there are a number of factors outside their control; in particular the recent increase in customer volumes meant that they lacked the time to greet all customers as they entered the local office. Staff explained that, although good practice required interaction with each customer to ensure that all needs were being met, it was becoming increasingly difficult to maintain this. The general feeling reported by staff was that the increase in customers since the economic downturn had put pressure on staff resources and made it more difficult to interact with customers.

2.2.4   Staff reactions to AJCS

In general, staff reactions to AJCS have been positive. As one CSM commented:

> *'It was difficult at first and to be honest we were all pretty sceptical but yeah, I think it's working well now. People have got used to it and we wouldn't have been able to keep doing as we were, not with the numbers you have coming in now.'*

(Customer Service Manager)

A number of staff highlighted that it was important to maintain some flexibility in how AJCS was implemented. Whilst staff felt that the new processes had brought a more structured approach to handling customer enquiries, staff emphasised the importance of being able to adapt AJCS to local circumstances.

Nevertheless, staff attitudes towards AJCS varied and staff could identify areas for improvement. A number of CSMs argued that there had been a 'trade-off' between delivering individualised care and efficiency. They said they now had less time to identify customers' needs in order to meet them in the most efficient way. Some CSMs said that this had been difficult to adapt to. However, others said that the level of individualised care they provided prior to the introduction of AJCS would not be possible given the current economic climate and that 'handing on' customers to different stages or agencies was an efficient way of dealing with increased footfall.

Similarly, some CSOs mentioned that increased claim volumes as a result of the current economic climate limited the time they had to deal with customer enquiries. Although AJCS guidance does not specify timescales for how long CSOs should spend with customers, there is an underlying belief amongst Stage 2 and 3 staff in many local offices that there is a set time limit. Estimates of this time limit ranged from five minutes in some offices to 20 minutes in others. One CSO (Interviews) reported that they were frequently told to hurry up by their CSTL when dealing with customers. This CSO said that she did not always have time to resolve customers' enquiries even when the information was available.

Some staff also felt that the descriptions of their roles provided by Jobcentre Plus were not completely practicable or fully reflective of what their job entailed. For example, one CSTL argued that the job descriptions overlooked the level of expertise needed to deal with customer enquiries effectively:

> *'Job roles' descriptions don't fit reality. Job roles for Customer Support Officers (Appointments and Interviews) state that staff don't need to know about benefits, but this isn't realistic as they need to give a lot of advice to customers and need to check what customers are telling them.'*

(Customer Support Team Leader)

CSOs who had worked in the office before the introduction of AJCS had mixed views on the merits of the system. Whilst some felt that the division of responsibilities, between CSOs (Appointments) and CSOs (Interviews), ensured that the number of customer enquiries they dealt with was kept at a manageable level and enabled them to resolve issues as quickly and directly as possible, others felt that the division was unnecessary. Similar views were held concerning the process of redirecting customers to BDCs.

Some staff found it difficult to redirect customers to BDCs or other parts of Jobcentre Plus as they preferred to deal with the customer themselves. One CSO (Interviews) described how, although staff in her office had generally adapted well to the introduction of the redirecting process under AJCS, some *'may still take the query further because of their own experiences in benefits prior to AJCS'* (Customer Support Officer – Interviews).

The sufficiency of the information provided under AJCS was also raised as a concern. Staff said that whilst they have been given guidance on how to deal with particular issues – for example new claim enquiries – this guidance was not always seen as practicable in the context of perceived time constraints, increased customer footfall or a shortfall in staff resources.

2.3   Footfall in local offices

AJCS was introduced as a way of managing customer footfall, particularly unappointed footfall, effectively. This section considers how staff sought to manage footfall (Section 2.3.1), how staff identified the appropriate channel for customers (Section 2.3.2), perceived changes in the level of footfall (Section 2.3.3), and staff views of customers' reactions to AJCS (Section 2.3.4). Customer representatives' views on AJCS and customer footfall are also explored (Section 2.3.5).

2.3.1   Managing footfall

Jobcentre Plus local office staff said that maintaining a balance between managing the forum area according to Jobcentre Plus guidelines and ensuring that the Jobcentre Plus local office was accessible to all who wish to use the services presented a significant challenge in the current economic context, and approaches varied across offices.

Some Customer Care Officers and CSMs stated that one of the ways they tried to control the volume of customers in the forum area was to only allow entrance to those with appointments or those signing on. One Customer Care Officer explained that entry was restricted because if they allowed everyone who wanted to enter to do so, the two available Customer Care Officers would be unable to properly manage health and safety risks and so prevent incidents in the forum area. Limiting entry to local offices departs from AJCS, which although it aims to encourage customers to make appointments or use the self-service facilities in local offices, does not remove the availability of face-to-face assistance without an appointment.

The volume of customers was also putting pressure on the availability of facilities in local offices. For example, one Customer Care Officer said that whilst Jobpoints were available if people wished to use the office solely to search for jobs, given that approximately 5,000 customers came through the doors each week and the office had only 11 Jobpoints, it was not always possible to provide this service to all customers.

2.3.2 Identifying appropriate channels

One Customer Care Officer said that the majority of customers in their office were aware of which channels to use. Under AJCS guidelines CSMs select the appropriate channel for customers without appointments based on the nature of the customer's enquiry, how 'vulnerable' the customer was perceived to be (see Section 2.5) and whether the CSM felt that the customer could resolve the issue themselves or whether they needed further assistance.

Staff at Stage 1 said that, although staff in the forum area would try to stick as closely to the AJCS guidelines as possible, where appropriate they take a flexible approach to redirection. For instance, one CSM described how, if a customer without an appointment had a query that the CSM could resolve quickly, she would assist the customer rather than redirecting them. As one CSM said:

> 'I wouldn't refer every person. I know you're only meant to take a minute or something but in real life you've got to be a bit more flexible.'

> (Customer Service Manager)

This may be because the majority of CSMs and forum staff who were interviewed had several years' experience and like this CSM felt that they were able to deal with many of the (benefit) enquiries they received without redirecting customers.

Staff at Stages 2 and 3 could also exercise a degree of flexibility when dealing with customers and as a consequence the extent to which staff redirected customers to the self-service channels and the BDC varied. Some staff said that they try to assist customers with their enquiry as much as possible rather than redirect them. One CSO said that they always attempted to resolve the customers' query if they had the time. Another said that they would occasionally see customers without an appointment if their enquiry could be dealt with quickly. On the other hand, one CSTL said that they would only intervene in the most complex cases and

would otherwise redirect customers to the relevant teams. Another CSO said that the majority of customers without appointments who required further assistance were either redirected to another channel or had an appointment made for them by CSOs or forum area staff and estimated that less than one per cent needed to be seen immediately.

2.3.3 Changes in footfall

The absence of a local office where AJCS was not implemented makes it impossible to estimate whether or not AJCS did in fact have an effect on the level of unappointed footfall in local offices. Additionally, increases in the number of people entering local offices due to the economic downturn made it difficult for staff to identify the effects of the introduction of AJCS conclusively. Thus, the views expressed by staff on the impact of AJCS on customer footfall are necessarily impressionistic.

Staff perceptions of the level of unappointed footfall and the effect of the introduction of AJCS on footfall varied across Jobcentre Plus local offices. Some staff believed that overall, AJCS had a positive effect on levels of **unappointed** footfall. As one CSM stated:

'Obviously it did make a lot of difference to footfall – when AJCS was introduced – because people got the message that [CSMs] *weren't going to have a look on the computer and try and sort out this issue with the claimant, they were just going to be directed towards the phone so they weren't bothering to approach us at all, they were just going straight to the phone or ringing from home. So yeah, it did decrease footfall quite a lot.'*

(Customer Service Manager)

This view was widely supported by others; although not always for reasons that were directly attributable to AJCS. For example, one CSM stated that footfall had decreased because their office no longer administered Social Fund 'crisis loans'.

On the other hand, some staff claimed that the volume of people entering the Jobcentre Plus local office without an appointment had either remained the same or had increased, due to the influence of external factors. As one CSM described, whilst the introduction of AJCS had reduced waiting times, the level of unappointed footfall was still high due to the number of new claimants. Another said that the location of the office (in a local shopping precinct) meant that people tended to drop into the office regardless of AJCS.

Other staff had trouble identifying a change in footfall as being due to the introduction of AJCS as the delivery of services by Jobcentre Plus had changed at the same time. For example, in one Jobcentre Plus local office, the time allocated for signing on had been extended during the AJCS roll-out and, although footfall had remained the same, the combination of these two factors made assessing the effect of AJCS on footfall in this office difficult.

One CSTL argued that although customers were advised by staff at the local office to contact the BDC directly, the level of footfall had not changed because some customers still favoured face-to-face contact with Jobcentre Plus staff. However, some Stage 2 and 3 staff said that although the introduction of AJCS had not had a substantial effect on the levels of unappointed footfall, it had made this footfall easier to manage. In particular the introduction of AJCS had reduced waiting times.

There were also differences in staff perceptions of the number of appointments made for customers. Whilst some CSOs said that very few appointments were made for customers in the local office, others said that their diary was normally full. One CSO said that she frequently had ten or more appointments per day.

Assessment of the impact of AJCS was further complicated when people entered local office for purposes unconnected with Jobcentre Plus. Staff, for example, had encounters:

> *'From people looking for bus passes to health queries, child benefits, housing…a lot of people think that the jobcentre is the local Citizen's Advice Bureau.'*

(Customer Service Manager)

2.3.4   Staff views of customer responses

There were also variations in staff perceptions of how well customers were responding to being redirected to the self-service channels. Most forum area staff believed that, over time, customers perceived an improvement as a result of AJCS in the quality of service that Jobcentre Plus provided, but this depended on the nature of both the customer and their enquiry. For example, some staff felt that customers now preferred being able to call the BDC directly. One CSM described how customers appreciate being given ownership of the process. Another said that the channelling system gave customers the sense that their enquiry was progressing.

Furthermore, some staff said that in light of the increase in the number of customers due to the recent recession, AJCS had allowed them to ensure that the Jobcentre Plus local office offered a safe and comfortable environment for everyone.

In addition, some staff argued that the previous system would not have coped with the increased volume of customers.

Whilst many forum staff felt that customer awareness of the new system was high, some customers still expressed a preference for face-to-face assistance. As one CSM commented:

> '[It] *has taken a lot of customers a long time to adjust to the new systems. They have been used to a face-to-face service with a known member of staff. They expect continuity and prefer this…'*

(Customer Service Manager)

A CSO commented: *'some people prefer face-to-face support, a lot of people don't have the confidence to do things themselves'*.

Another CSO highlighted the need to encourage some customers to use self-service facilities: *'a few need coaxing but they are mostly OK when it is explained to them'*. This point was also made by a CSM:

> *'Most of the customers are happy being directed but sometimes people come up with an excuse saying there are unable to use the warm phones… Staff do try and insist that they use the phones though.'*
>
> (Customer Service Manager)

Whilst some CSOs felt that customers generally reacted well to being redirected if the benefits of doing this were explained to them, sometimes customers could be resistant to being directed to the self-service channels or being told to contact the BDC themselves. Particularly if they perceived that to do so would increase their waiting times. Some Customer Care Officers highlighted this as a problem, one said:

> *'Customers get frustrated that they cannot get through to the Benefit Delivery Centre…the call centres cannot deal with the calls and the phones have been broken as a result. People simply cannot get through…'*
>
> (Customer Care Officer)

Staff at Stages 2 and 3 suggested that prior experiences with Jobcentre Plus also influenced the number of people who requested face-to-face service. For instance, one CSO observed how:

> *'Negative experiences of the Benefit Delivery Centre lead to customers coming in who explicitly request "do not put me on the phone", when explaining their situation.'*
>
> (Customer Support Officer)

This view was supported by other CSOs and CSTLs who highlighted how customers who had failed to get through to telephony teams in the past were less receptive to being redirected to self-service facilities.

This suggests that there may be room for improvement in how customers without appointments are directed between parts of the organisation, and the redirection of vulnerable customers is considered in Section 2.5.

2.3.5   Customer Representative Group perceptions towards footfall

Customer representatives described a number of problems for their customers as a result of the introduction of AJCS. However, it is important to be aware that agencies represented within the National Jobcentre Plus Customer Representative Group Forum were likely to be contacted by customers with difficult and complex cases and/or who have had a negative experience of dealing with Jobcentre Plus. Thus the extent to which these issues applied to customers in general is unknown.

Customer representatives were more critical of the division of duties under the AJCS process than Jobcentre Plus staff. One issue was the effect the introduction of AJCS had on the level of expertise available in Jobcentre Plus local offices. As forum area staff no longer have to deal with benefit enquiries under AJCS, the perception was that they were now less likely to understand the benefit system. One customer representative argued:

> '*I think the issue is functionality, i.e. splitting up things like signing on interviews into a jobcentre, the payment of your benefits being dealt with by a Benefit Delivery Centre…has led to a lack of expertise in jobcentres to be able to deal with very basic questions.*'

> (Customer representative)

Customer representatives felt that this presented particular challenges in the light of the economic downturn. In particular, the new system of self-service and 'handing on' of enquiries had made the process more confusing for customers, particularly those with little or no experience of the benefits system. Customer representatives said that these customers have quite substantial difficulty in navigating the new system and this has served to make Jobcentre Plus services less, not more, accessible.

Customer representatives were less positive than Jobcentre Plus local office staff about the impact of AJCS on footfall. They perceived a tension between staff's interpretation of AJCS and maintaining Jobcentre Plus local offices as a public space. They said that refusing access to customers without appointments could compound the difficulties faced by customers with unseen disabilities (such as those with mental health conditions and the hearing impaired).

Customer representatives wanted Jobcentre Plus to review its guidance on managing unappointed footfall to take into account the increased number and changing characteristics of new claimants, the majority of whom had little or no experience of the benefits system. This raises issues about what sort of information customers receive before they enter the AJCS process and how new claimants are served.

2.4   Health and safety

2.4.1   Managing health and safety

Maintaining health and safety standards and minimising risk in forum areas is a key aim of AJCS. In part it shaped Customer Care Officers' and CSMs' attitudes towards dealing with customers in Jobcentre Plus forum areas and in some cases it affected their interaction with customers and their approach to managing Jobcentre Plus local office facilities.

Staff based their assessment of risk on prior knowledge of particular customers, their experience with particular types of customers and customers' reactions to particular situations. Some staff admitted that identifying potential risks in this

way could cause problems for vulnerable customers who were also potentially violent, because they needed face-to-face assistance rather than being classed as a potential risk (see Section 2.5).

Staff identified two inter-related reasons that could give rise to health and safety incidents. They felt that incidents were more likely to arise due to customer frustration with waiting times, and/or if customers were unhappy with the response to their enquiry. Uncertainty about, or delays in, obtaining benefit could lead to incidents in local offices. This view was supported by a Customer Care Officer who also said that recent changes in the available facilities had caused tensions in the forum area:

> *'As* [the] *number of* [Customer Access Points] *reduced, people got angry and verbally aggressive as they had to wait for them for ages…'*

> (Customer Care Officer)

In addition, the increased use of Customer Access Points was described as a potential health and safety problem by many staff. Customers could often become frustrated when they could not get through to BDC telephony teams due to the volume of enquiries the teams are dealing with. One Customer Care Officer stated that incidents in his office had doubled as:

> *'Customers get frustrated that they cannot get through to the Benefit Delivery Centre…the call centres cannot deal with the calls and the phones have been broken as a result. People simply cannot get through…'*

> (Customer Care Officer)

Although staff at Stages 2 and 3 have less direct experience with managing health and safety issues than staff at Stage 1, some confirmed that some customers reacted badly to being redirected to self-service channels or being referred to other branches of the business, for example, the BDC. Redirecting customers to the BDC was potentially problematic as customers might not obtain the response they wanted. However, staff underlined that this potential risk was not necessarily due to the introduction of AJCS. As one CSO commented:

> *'There are problems particularly when customers receive unfavourable news, but I think these customers are always going to be like this regardless of how things change.'*

> (Customer Support Officer)

However, as relatively little administrative data on footfall were kept by local offices and the volume of customers in Jobcentre Plus local offices had risen dramatically during the economic downturn it is difficult to assess whether these situations were associated with change in systems.

Forum area staff had a number of approaches to minimise the risk of incidents. In general their approach was a combination of dealing with the customer's enquiry as efficiently and effectively as possible, noting potentially troublesome customers

and ensuring that Customer Care Officers were on hand in case problems arise. For example, one Customer Care Officer said:

> '[We] *make sure that customers are listened to carefully and passed on quickly to the right place. That is* [the] *key to reducing incidents…'*

> (Customer Care Officer)

As well as ensuring that customers received a satisfactory resolution to their enquiries, staff at Stage 1 said that a coordinated approach to the management of health and safety in forum areas, which involved working with CSMs, was essential to identifying and reducing risk and minimising the likelihood of incidents escalating.

Another approach that was adopted in some offices was to sometimes restrict access to customers with appointments. This is due to the perception that:

> *'Limiting 'wandering about' in the office by customers is important in reducing incidents…'*

> (Customer Service Manager)

2.4.2 Perceived changes in health and safety

Changes in incidents under AJCS

The evaluation explored whether the introduction of AJCS has affected both the type and frequency of incidents in Jobcentre Plus forum areas. The following analysis is based on staff perceptions, rather than, for example, administrative data. Staff assessments of the impact of AJCS on incidents varied markedly across local offices. For example, whilst some thought AJCS had limited, or even reduced, the number of incidents, because queueing times had reduced and customers were handed on to the relevant agencies quickly, others said that the system of handing on enquiries was a frequent cause of tension itself. Indeed, some staff said that by encouraging customers to call BDCs directly, AJCS had introduced a further issue for forum staff to manage.

AJCS and managing risks

Part of the rationale behind AJCS was to prevent the escalation of possible tensions within Jobcentre Plus local offices by targeting 'difficult' customers and ensuring that their needs were met. Staff views differed between those who felt attitudes to risk management had not changed and those who felt they had following the introduction of AJCS. Whilst customers in some offices who appeared agitated or were previously considered 'troublesome' could now be classed as vulnerable and receive more attention, elsewhere the introduction of AJCS was seen as contributing to stricter management of forum areas and less individualised care. As one CSM described:

> *'Before AJCS more of the work would have been done by Customer Service Managers in a room at the back which is a more continuous and personal service…this is an area* [where issues] *can be dealt with a lot more sensitively – AJCS does not allow for this…'*
>
> (Customer Service Manager)

Despite these reservations, many forum area staff felt that the changes to health and safety management under AJCS had been positive. Staff thought that the more proactive role of Customer Care Officers was an important factor in the speedy and effective identification and management of risks.

Support and guidance

Jobcentre Plus forum area staff were reasonably satisfied with the support and guidance provided on health and safety under AJCS.

2.4.3 Customer Representative Group perceptions of health and safety

In terms of health and safety management, the customer representatives argued that the role of Customer Care Officers needed to be clarified further and that the delineation between maintaining health and safety standards and ensuring the Jobcentre Plus office was accessible needed to be treated more carefully. Customer representatives believed that the interpretation of the role of Customer Care Officer varied between offices; and that in certain offices the role was interpreted too robustly. Reports from their customers suggest that in some cases Customer Care Officers prevented customers without appointments accessing Jobcentre Plus services. Although forum area staff stated that restricting access to offices was necessary at certain times in order to minimise the number of people in office forums, customer representatives argued that the public had a right of access to Jobcentre Plus services. Whilst customer representatives said that they recognised the need for health and safety management in Jobcentre Plus forums, they felt that health and safety management had been given primacy over ensuring that local offices were an accessible public space. They were concerned that preventing members of the public from entering Jobcentre Plus offices was becoming common practice which could limit the availability of Jobcentre Plus services.

2.5   Vulnerable customers

2.5.1   Identifying vulnerability

Guidance on the implementation of AJCS underlines the need to prioritise vulnerable customers. These customers are defined by Jobcentre Plus as people who are *'unlikely to be able to use normal channels and are likely to benefit from face-to-face support'* (AJCS – Go Look See Support Pack). According to Jobcentre Plus guidelines, customers with priority needs should be identified by staff as they enter the Jobcentre Plus local office or try to access Jobcentre Plus services.

The guidelines acknowledge that the identification of a vulnerable customer may need to take place *'in matter of seconds'* (AJCS guidance: 9) and recognise that a customer's vulnerability can change over time:

> *'… vulnerable customers are those who have difficulty in dealing with the demands of* [Jobcentre Plus] *processes **at the time** when they need to access a service.'*

> (AJCS guidance: 9)

Staff have to base their assessment on a combination of behavioural evidence from communicating with the customer and the customer's personal circumstances. Behavioural evidence is assessed by:

• whether the customer is in distress;

• how well they understand the CSM;

• whether they are giving one word responses, for example 'yes' or 'no';

• whether they are frustrated; and

• whether they are upset.

Jobcentre Plus guidance also states that 16/17 year old customers should always be offered face-to-face support.

The categorisation of potentially violent customers as vulnerable was welcomed by Stage 1 staff.

Staff at all three stages of AJCS said that they identified a customer with a priority need using a combination of their past experiences with the customer and how the customer appeared when in the office. On the whole, forum area staff felt relatively confident that customers with priority needs were being identified successfully and their needs met under AJCS; as one CSTL explained:

> *'I've been doing this for so long I've a sixth sense…'*

> (Customer Support Team Leader)

Indeed, it was possible to identify vulnerable customers *'just by talking to them really' and that staff 'could see they* [were] *vulnerable as they came in.'* (Customer Service Manager)

Other staff articulated a more specific behavioural criterion and stated that their assessment of vulnerability depended on whether the customer would be able to use the self-service facilities without assistance. One CSM said that her assessment of potentially vulnerable customers:

> *'Focused on whether they have access to telephones…assessment of customers' ability to manage claims through the telephony approaches is required when deciding where to refer them.'*

> (Customer Service Manager)

Customers could also self-identify themselves as vulnerable. However, some staff felt that there were problems around the self-identification of vulnerability. This perception reflects AJCS guidance which states that *'there are some customers who are capable of using our preferred channels but choose not to'* (AJCS guidance: 9). So, for example, customers with English as a second language could initially be unwilling to use self-service facilities but:

> *'… I'd still put them on that phone that they're meant to be on but I'd stand by and help them to make sure that they make the enquiry effectively.'*

> (Customer Service Manager)

Some CSMs said that in most cases they were expected to determine vulnerability in less than one minute. In practice, the length of time taken for interactions with customers was more flexible. Whilst many CSMs said that they could often identify appropriate channels for a customer relatively quickly, it was pointed out that the length of time taken to identify the appropriate channels might depend on the level of the CSM's experience.

The perceived success of CSMs in identifying vulnerability and priority need was underlined by staff at Stages 2 and 3. According to one CSO:

> *'The Customer Service Managers can tell who is vulnerable, who they can send to the phones and who needs to be seen. They're pretty good at that.'*

> (Customer Support Officer)

Although, of course, this respondent might not know who the CSM should have classified as vulnerable, but failed to do so.

Nonetheless, some CSOs and CSTLs recognised that what counted as vulnerability was not unproblematic. One CSO commented *'everybody has their own view of what a vulnerable customer is'*. Whilst one CSTL said that if the customer could use the telephone they were expected to do so, even though they may have an underlying vulnerability which is not immediately apparent (mid-range autism for example), another CSO said that he would class everyone he saw as vulnerable in some way. The risk with both points of view is that the needs of vulnerable customers may not be being fully met.

2.5.2 Handling vulnerable customers' enquiries

Under AJCS guidelines customers identified as having a priority need were either handed on to Stage 2 of the AJCS process, where they received face-to-face assistance with their enquiry, or offered face-to-face assistance with Jobcentre Plus services such as Jobpoints and Customer Access Points. AJCS guidance also stresses that staff needed to be flexible in their approach and *'take into account the individual needs of the customer'* (AJCS guidance:10).

The guidance underscores that vulnerable customers are often aware of how their needs would best be met and states that *'the customer knows best what*

their needs are so ask them rather than assume what they might need' (AJCS guidance:10). Indeed, staff said that they would try to take into account the views of the customer themselves when deciding how best to manage their enquiries. For example, some staff reported how people with physical disabilities or customers with English as a second language were often accompanied by family or friends who the customer wished to act as translator or help them to use Jobcentre Plus facilities. However, as described in Section 2.3, this could be frustrated in offices where family and friends were required to wait outside.

CSMs' approach to making appointments for vulnerable customers differed across local offices. For example, one CSM stated that she would occasionally manage vulnerable customers' enquiries herself rather than handing enquiries on to CSOs.

A range of approaches to managing enquiries from customers with priority needs was outlined by Stage 2 and 3 staff. Most staff said that vulnerable customers were seen by CSOs either immediately or the following day and staff usually liaised with BDC telephony teams to find the best possible resolution. However, dealing with vulnerable customers could be particularly challenging for some Jobcentre Plus staff at Stages 2 and 3, in part due to the availability of staff to deal with customers' enquiries on an individual basis. For instance, one CSO felt that, where customers needed a lot of help completing forms, the local office was unable to help due to the time and nature of the evidence required. In this situation the CSO tended to refer customers to Citizens' Advice.

One CSO (Appointments) estimated that around four out of five of the enquiries handed on from CSMs could be dealt with at Stage 2. According to some staff, these tended to be repeat customers who were known to staff at this stage. Staff suggested that up to half of the customers forwarded to Stage 2 of AJCS are considered to be in need of a Stage 3 appointment. Although staff are meant to be encouraging customers to use self-service facilities as much as possible, one CSO commented that vulnerable customers with experience of dealing with staff at Stage 3 will often ask to see them directly.

2.5.3   Changes since the introduction of AJCS

Stage 1 staff's views on the impact of AJCS on the service provided to vulnerable customers were mixed. Whilst one CSM said that the amount of attention given to customers with priority needs should have increased if the system was being implemented correctly, others were less positive. For example, one CSM felt that the service provided to vulnerable customers had declined as customers were not receiving the same level of face-to-face assistance. Echoing this, another said that the service to vulnerable customers was more sensitive to their needs under the previous system as it had allowed CSMs to provide a level of one-to-one care which she felt was absent under AJCS. However, another CSM argued that Jobcentre Plus local offices provided the same level of high quality care to every customer and this had not changed with the introduction of AJCS.

Similarly, there was a range of views expressed by staff at Stages 2 and 3 about the impact of AJCS on approaches to dealing with vulnerable customers. For example, one CSO felt that the introduction of AJCS had brought increased pressure on CSOs to deal with customers more quickly. Others said that the level of support being delivered was not as intense as previously and that the introduction of AJCS had initially inhibited the provision of adequate service to customers until staff broadened the classification of vulnerability. On the other hand, some Stage 2 and 3 staff felt that the introduction of AJCS had helped to direct support to vulnerable customers more effectively. One CSO said that it had made them more aware that some people needed more assistance than others.

2.5.4   Customer Representative Group perceptions towards vulnerability

Customer representatives were less positive than staff about Jobcentre Plus' approach to vulnerable customers under AJCS. They felt that Jobcentre Plus staff's interpretation of what was a priority need varied substantially across offices; that staff were often insufficiently trained to identify any but the most obvious cases; that staff were not sufficiently trained to deliver a service to all vulnerable customers; and that too many people with perceived priority needs were being referred to advice agencies when a solution could be found within Jobcentre Plus local offices.

Customer representatives said that, although AJCS was designed to allow staff to support vulnerable customers by encouraging 'non-vulnerable' customers to use the self-service facilities, many vulnerable customers were not being identified. Customer representatives said that there was a lack of clear standardised information regarding who was eligible for face-to-face assistance and this in turn could create confusion. As one customer representative stated:

> '… none of the Jobcentre Plus offices seemed to agree as to what their policies were as to who they would see face-to-face…and the client [was] having to phone every Jobcentre Plus to try and ascertain whether they would see them face-to-face, whether they would accept them as vulnerable, and it changed from one to the other…'

> (Customer representative)

Customer representatives also felt that customers with less obvious vulnerabilities were being overlooked by Jobcentre Plus staff due to insufficient training, and that the needs of customers with mid-range conditions, unseen disabilities, literacy and learning difficulties, invisible vulnerabilities and mental health conditions are not being met under AJCS. One example was:

> '… somebody with autism, middle of the scale, who has got a wonderful speaking voice…but he is totally disconnected from the world around him, you would not class him as vulnerable if you were talking to him face-to-face. I don't know how they…find out if somebody has got it…'

> (Customer representative)

One customer representative believed that the number of people who were failing to be recognised as vulnerable had increased and that their organisation frequently had to intervene on behalf of customers with less obvious vulnerabilities:

> *'… we are seeing increasing numbers of people who are struggling to be identified in any way as vulnerable and in fact aren't until they have been told they have to go to* [an organisation] *for help and* [the organisation] *takes up their case and identifies them as vulnerable and goes back…'*

> (Customer representative)

Customer representatives also felt that approaches to health and safety management or managing footfall could limit the accessibility of Jobcentre Plus facilities for customers with priority needs. For instance, offices where access was restricted to customers with appointments only could also prevent family or friends from accompanying vulnerable customers.

The assessment of a customer's vulnerability in forum areas was a cause for concern to customer representatives who pointed out that customers with certain priority needs, for example, literacy problems, might not always identify themselves as vulnerable or might not be comfortable identifying themselves as vulnerable in public.

Customer representatives stressed that failure to identify or communicate with vulnerable customers could lead to serious problems with claims and hardship for the customer. One customer representative described how this was a particular problem for customers with certain mental illnesses, for example, bipolar disorder, who may *'become extremely positive and reactive'* (Customer representative). As assessment of vulnerability is based both on how the customer appears when they enter the Jobcentre Plus local office and whether the customer self-identifies as vulnerable, some of these customers might not be recognised as having priority needs. One customer representative commented, *'…it tends to be the more vulnerable people who are having the most difficulty.'*

2.6   Jobsearch

2.6.1   Staff attitudes towards jobsearch

Staff perceptions of the impact of the introduction of AJCS on jobsearch differed. Whilst some staff maintained that jobsearch activity in the local office had increased, others felt that rising unemployment made it difficult to identify the impact of AJCS on jobsearch.

According to staff, recent increases in footfall could limit the provision of jobsearch services to customers. Firstly, restricting access to Jobcentre Plus facilities to customers with appointments only (see Section 2.3.1) limited customers' jobsearch opportunities.

Secondly, the increase in numbers limited the time staff could spend with customers on jobsearch. Although there had been scope for assisting jobsearch in local offices when AJCS was introduced, the perception was that offices were now far too busy to offer these services; as one CSM explained:

> *'In theory, when those queues dropped down a little bit, we were meant to get more involved in the jobsearch and maybe some of us did. But now it's just got so busy, we don't really have time for that either…'*

(Customer Service Manager)

Another CSM said that as a consequence of the increase in footfall, *'moving people through the AJCS process* [is] *the priority.'*

Similarly, staff at Stages 2 and 3 said that maintaining a consistent level of support with equal attention given to resolving customer enquiries and encouraging jobsearch activity was particularly difficult. This was because their time was limited by the large number of customers they had to serve.

Moreover, many CSOs felt that limited time had led to inconsistencies in the support provided. Although time limits are not set out in Jobcentre Plus' AJCS guidance, many staff at Stage 2 said that they were expected to hand on customers to the appropriate agencies or Stage 3 in under three minutes. One CSO described how they had five minutes to deal with jobsearch in interviews with customers at Stage 3. This CSO was critical of this approach because of the complexity of the issues and types of customers they had to deal with at this stage. A CSTL pointed out that many of their customers need substantial input before they were job-ready, whilst a CSO explained that finding the right moment to discuss jobsearch with customers was crucial:

> *'If people are in the frame of mind where they are waiting to hear about a benefits decision they will not welcome an approach about a jobsearch as this won't be their immediate priority.'*

(Customer Support Officer)

2.6.2   Customer Representative Group perceptions of jobsearch

Customer representatives felt that some jobsearch services offered by Jobcentre Plus staff were either ineffective or inaccessible for customers. They claimed that customers were not being given guidance on how to use Jobpoints, some of the jobs offered to customers were not appropriate, and (as already mentioned previously) that sometimes customers were being refused access to jobsearch facilities by Customer Care Officers. Customer representatives argued that the quality of service offered by Jobcentre Plus regarding jobsearch had declined. However, it is unclear whether or not this is due specifically to the introduction of AJCS or reflects the recent increase in customer footfall or that they were more likely to have contacts with customers who had experienced problems in their dealings with Jobcentre Plus.

2.7   Conclusion

This chapter explores how AJCS has been operating in local Jobcentre Plus offices. Notwithstanding initial concerns, staff said they felt that the roll-out of AJCS has been largely successful. Staff said that they have been given sufficient guidance and training. Staff perceptions of why AJCS was introduced and the purpose of the new approach are generally aligned with Jobcentre Plus' policy intentions.

The introduction of AJCS meant that the roles that staff performed changed. The main changes in responsibilities identified by staff were the use of shared appointments diaries, increased contact with other teams and stricter guidelines on how to manage customer enquiries. However, some staff said that although the title of the role was new, the content mirrored that of their role before the introduction of AJCS. Some staff questioned the accuracy of role descriptions provided under AJCS. These staff felt that the descriptions overlooked the expertise needed to deal with customers' enquiries effectively and that the roles were not always practicable given the range of enquiries they had to deal with and the need for flexibility in delivering the service.

It is unclear whether the introduction of AJCS had encouraged a standardised delivery of service across local offices. There are, for example, distinct differences between local offices in the management of unappointed footfall and identification of vulnerable customers. The introduction of AJCS has elicited certain behaviours from staff, both desired and undesired. In terms of the desired behaviours, CSMs stated that they now offer much less individualised face-to-face assistance to customers who are able to use the self-service facilities and spend less time with customers who can contact the relevant agencies directly and instead focus more on identifying customers who might require more support. Staff were combining Jobcentre Plus guidance with their own experience and the characteristics of the customer themselves in order to identify the most appropriate way of meeting customers' needs. This allows for a more flexible approach which could be adapted to suit customers whose needs may fall outside the guidance provided. There is also evidence that Customer Care Officers have more involvement in the workings of the Jobcentre Plus local office than before. This allowed for more comprehensive management of both health and safety and customer flows in Jobcentre Plus forum areas. As well as this, some staff said that by dealing with customer enquiries as efficiently and effectively as possible and encouraging those customers who were able to use self-service facilities to contact the relevant bodies directly, they were able to focus on jobsearch.

On the other hand, the aim of minimising unappointed footfall within Jobcentre Plus local offices might have been interpreted too robustly by some Customer Care Officers, when they restricted entry to local offices to those with appointments only or refused entry to friends or family members of customers as a way of minimising health and safety risks. Furthermore, customer representatives argued that people with invisible disabilities, mid-range conditions and people with mental illnesses were not necessarily identified as vulnerable by Stage 1 staff as they

relied on how the customer appeared when they first enter the local office. This approach will tend to lead to the recognition of those with more extreme or visible vulnerabilities at the expense of 'hidden' impairments and health conditions and could conceivably result in contravention of the Disability Discrimination Act.

Moreover, customers with more complex enquiries could sometimes find themselves repeatedly passed between channels before a resolution was found. Customer representatives argued that this not only causes distress for the customer but could also leave them with a negative impression of Jobcentre Plus. The customer representatives suggested that there is a need to reassess the guidelines for dealing with unappointed footfall to take into account the increased number and changing characteristics of new claimants, the majority of whom had little or no experience of the benefits system.

Customer representatives also said that jobsearch was not always effectively supported or in some cases is promoted inappropriately to vulnerable customers who may not be 'job-ready'. Indeed, some staff said that the introduction of AJCS had a negative effect on jobsearch as once the customer's enquiry had been dealt with there was often insufficient time to promote jobsearch. Staff also said that it was difficult to gauge the effect of AJCS on jobsearch due to rapidly rising unemployment and limited job opportunities following the economic downturn.

The perceived impact of the introduction of AJCS on the management of unappointed footfall varied by staff. Some staff felt that AJCS has had a positive impact because, in general, customers were using the most appropriate channels and had encouraged customers to contact BDCs directly, which had made the volume of local office visits more manageable. However, it was highlighted that some customers, especially older customers, new claimants or customers with English as a second language, still needed to be encouraged to use the self-service facilities. Other staff claimed that there had been no noticeable change in footfall and that some customers still requested face-to-face assistance. A further group were uncertain about the effect of AJCS on footfall because of the current economic climate. However, some staff argued that the previous, more face-to-face support offered to all customers would have been unsustainable given the recent increases in the volume of customers entering local offices.

3   Benefit Delivery Centre

3.1   Introduction

This chapter looks at the relationship between Jobcentre Plus local offices and Benefit Delivery Centres (BDCs). Some local staff thought that in general their office had a good working relationship with the BDC. However, many Jobcentre Plus local office staff said that there were some specific aspects of the relationship between BDCs and Jobcentre Plus local offices under Accessing Jobcentre Plus Customer Services (AJCS) that were not working effectively. Differences in approaches to customer service, definitions of vulnerability and the use of shared diaries were all raised by local office staff as areas in the AJCS process where problems may arise. The evaluation explored the perspective of BDC staff in order to gain a comprehensive insight into the relationship between BDCs and the associated Jobcentre Plus local offices.

This chapter considers BDC staff awareness of AJCS (Section 3.2), changes in staff roles (Section 3.3), how they deal with enquiries (Section 3.4) and in particular those from vulnerable customers (Section 3.5). Staff and customer representatives' views on the nature of the relationship are also discussed (Section 3.6).

3.2   Benefit Delivery Centre staff awareness and understanding of AJCS

Awareness of AJCS amongst BDC staff ranged from extensive to negligible. Whilst most staff were aware of AJCS, some had not heard of the term. Some of the latter had been in post when AJCS was introduced. Other staff said that they knew there had been changes in how customer enquiries were dealt with but had not heard of AJCS before. This lower level of awareness could be due to the introduction of the new process impacting more significantly upon the local office.

These differences in awareness could be due to a number of factors such as the role of the interviewee within the BDC, the length of time they had worked at the BDC or the amount of specific training in AJCS they had received. Explanations of the aims and process of AJCS varied across centres. In general, staff with more senior roles,

including having responsibility for training new staff, and those who had worked at the BDC for over a year knew more about AJCS than other staff. One BDC team member said that this was because the changes had not been fully explained.

Understanding of the processes and aims of AJCS amongst BDC staff also varied. The range of perceived reasons for the introduction of the programme included:

* *'it's about managing the flow of people in Jobcentre Plus offices'*;

* *'to move people away from calling into Jobcentre Plus and for them to take more responsibility for themselves'*; and

* *'getting Jobcentre Plus back to what they used to be – helping people find jobs'*.

(Various Benefit Delivery Centre staff)

Although BDC staff's understanding of why AJCS was introduced mirrors many of the reasons given by local office staff – encouraging self-service, minimising footfall, promoting jobsearch – no one member of staff listed all of the programme's stated aims.

3.3 Changes in Benefit Delivery Centre staff role and training provided

Whilst the majority of staff interviewed said that there had been no change to their role within the BDC, others felt there had been significant changes, particularly for telephony staff. One member of a BDC telephony team described how they now processed everything before appointments were made in Jobcentre Plus local offices. This differed from the previous system where benefit enquiries could be dealt with by local office staff without consulting BDC telephony staff. However, one BDC Team Leader pointed out that, other than the introduction of the shared appointments diary and increases in the responsibilities of telephony teams, the majority of changes brought about by the introduction of AJCS had been in local Jobcentre Plus offices rather than BDCs.

Staff perceptions of the AJCS training provided also differed. Some staff felt that the training was sufficient; pointing out, for instance, that the diary was relatively easy to use so further training would be unnecessary. Others felt that more training related to practice would be helpful.

3.4 Benefit Delivery Centre customer enquiries

3.4.1 Responding to enquiries

Under AJCS customers are encouraged to contact BDCs directly either from home or by using the Customer Access Points. If the customer's query could not be resolved by the BDC telephony team, an appointment was made with a member of Jobcentre Plus local office staff via a shared appointments diary.

Staff said that the majority of enquiries received by BDCs were dealt with by the telephony teams without an appointment having to be made for the customer either in the local office or elsewhere. BDC staff said that they aimed to resolve between 70 and 80 per cent of the requests they received from customers. Telephony staff said that they were provided with a 'crib sheet' of responses that allowed them to process frequently asked benefit-related questions. In the rare cases that a customer's problem could not be appropriately dealt with by staff in less than six minutes, they will:

• call the customer back later that day;

• pass on the query to another department within the BDC; or

• make an appointment for the customer with a local office Customer Support Officer (CSO).

BDC telephony staff said that it was relatively rare that they redirected customers to Jobcentre Plus local offices, rather, referrals the other way were more frequent. Examples given by BDC staff of reasons for redirecting customers to Jobcentre Plus local offices included circumstances where additional information, such as P60 or 'change of address' forms, were required or where the customer was vulnerable.

The number of appointments made by individual BDC telephony teams differed across offices. Whilst some telephony staff estimated that they made between two and three appointments per week, other staff said that they frequently booked appointments for between nine and ten customers a day.

Using the shared diary, the BDC telephony team will also identify the appropriate length of time for the appointment. Staff used guidance from Jobcentre Plus regarding how long appointments should last depending on the complexity of the case. BDC telephony staff said that they generally used a combination of the guidance and their own judgement when gauging how much time they should allocate in the shared appointments diary.

3.4.2   Call handling

Jobcentre Plus local office staff and customer representatives said that long waiting times and the use of an 0845 number caused problems for both customers and local office staff. However, some BDC staff said that they were not aware that call waiting times for BDC telephony teams were an issue with customers and local office staff.

BDC staff estimates for how long customers waited before their enquiry was dealt with varied. Some staff said that during 'peak times' customers could wait for between two and 20 minutes, or even that customers could be cut off if there were too many people 'on hold'. Like local office staff, BDC telephony teams said that the volume of customer enquiries they received had risen dramatically since the economic downturn and this made it difficult for telephony teams to minimise customer waiting times.

3.4.3 Staff perceptions of customers' views

BDC staff reported that, although customers had become used to the system, reactions to being encouraged to contact the BDC directly were mixed. Some BDC telephony staff felt that customers had reacted positively to the changes brought about by the introduction of AJCS. They said that customers found the process more efficient than the previous system. However, some BDC staff said that there were customers who still preferred face-to-face contact:

> *'They now miss this contact and do not like having to post information.'*

> (Benefit Delivery Centre telephony team member)

Under AJCS, customers use an 0845 number to contact the BDC, and calls were perceived to be charged at a relatively high rate. According to BDC telephony staff this was a significant issue because customers might have to spend a long time on the telephone before their query was fully resolved. One member of a telephony team said that there were occasions where customers mentioned that they had tried to call three or four times and pointed out the cost of the calling an 0845 number. Moreover:

> *'A lot of customers do not have access to a land-line. Customers are frequently accessing neighbours' phones to make 0845 calls and are very conscious of the costs. Those using mobiles are charged a significant amount and this impacts on customers' income.'*

> (Benefit Delivery Centre telephony team member)

On the other hand, one telephony team member said that the use of an 0845 number was not an issue as the BDC usually made return calls to customers. Nonetheless, customers might accrue charges when making initial contact with BDCs. Overall, BDC staff were aware of the some of the problems the use of 0845 numbers and call-back systems might cause customers.

3.5 Vulnerable customers

Customers who were identified as vulnerable by BDC telephony staff should have appointments made for them with CSOs in the local Jobcentre Plus office via the shared diary. BDC telephony staff tended to use their own judgement when identifying vulnerability. Many of the staff interviewed said that they could identify customers who required further assistance after speaking to them for a few minutes.

BDC staff's perception of vulnerability generally mirrored the guidance provided by Jobcentre Plus. People with English as a second language, customers who suffered from mental illnesses, ex-offenders, and people with learning difficulties were all highlighted as customers who might require face-to-face assistance. Members of BDC telephony teams also said that they would liaise with Jobcentre Plus forum area staff to confirm customers with invisible disabilities or vulnerable customers who were also potentially violent.

Nevertheless, some local office staff felt that BDC staff frequently misjudged customers' vulnerability. However, it may be even more difficult to assess vulnerability over the telephone. For example, one Customer Service Manager (CSM) described how potentially violent customers might not be identified as vulnerable by BDC telephony teams.

3.6 Benefit Delivery Centre relationships with Jobcentre Plus local office

3.6.1 Staff views

Under AJCS guidelines, Jobcentre Plus local office staff and BDC staff should coordinate their activities in order to provide the best possible customer service. Although the majority of Jobcentre Plus local office staff felt that their working relationship with the BDC was generally positive, this relationship could, on occasions, be particularly challenging for both sets of staff. This view was expressed by local office staff in particular. As one CSM stated:

> *'We have continuing problems* [with the BDC]*. AJCS only functions correctly if the Benefit Delivery Centre are up to date.'*

> (Customer Service Manager)

Local office staff felt that staff at BDCs were not always aware of the difficulties caused to local office staff by customer reactions to information they received from telephony teams. Jobcentre Plus local office staff said that customers could become increasingly agitated if left on hold for a long time or could react badly to the information they had been given by the BDC.

The information passed between local office and BDC staff was raised as an issue by both sets of staff. Some CSOs felt that not enough information was being inserted into the shared diary by BDC staff and this made it difficult for local office staff to identify the most appropriate way to meet customers' needs quickly and effectively. Some BDC staff had a similar view. One described how there were instances where:

> *'… customers bounce between Jobcentre Plus and the Benefit Delivery Centre, usually stating a lack of information or misinformation at one side.'*

> (Benefit Delivery Centre telephony team member)

According to staff there were a number of reasons for the perceived weaknesses in the relationships between local offices and BDCs. These include high staff turnover in BDCs, available staff resources in BDCs, the amount of training provided to telephony teams, differences in terminology, and differences in approaches to making entries in the shared diaries. Jobcentre Plus local office staff felt that these factors could lead to inconsistencies in the service provided to customers.

The use of shared appointments diaries was highlighted as an issue by local office staff. Although BDC staff said that telephony staff generally had a good awareness of how the diary should be used, local office staff could report different experiences. CSOs, for instance, stated that BDC staff frequently failed to insert sufficient customer information or 'double-booked' appointments. This, local office staff argued, caused confusion and delays to the AJCS process. However, as one CSO explained, this is also partly due to the structure of the diary system which allows very little space to insert customer information. As noted previously, BDC staff often used their own judgement when identifying how long an appointment should last, which, according to local office staff, could cause problems if the enquiry was more complex than it first appeared.

Staff in local offices also felt that the use of 0845 numbers and extended call-waiting or call-back times caused frustration and put pressure on local office staff. Jobcentre Plus local office staff said that some customers could not afford to use the 0845 number and this created problems, particularly in offices with a limited number of Customer Access Points. Local office staff said that many of the negative responses to AJCS by customers were due to the cost of contacting the BDC (see Chapter 2).

That customers could have to wait for three hours for a call-back was identified by local office staff as a main cause of problems in local offices. One Customer Care Officer, for instance, described how customers frequently become increasingly agitated whilst waiting for these call-backs and this posed a significant health and safety risk.

3.6.2   Customer Representative Group views

Customer representatives were critical of customers having to contact BDCs themselves. They argued this presents customers without access to telephones or without a fixed abode with a significant problem and made finding a resolution to their benefit enquiries more difficult. Customer representatives echoed the views of Jobcentre Plus local office staff by highlighting call-waiting times and the use of an 0845 number as being particularly problematic and suggested that these aspects of the service needed to be re-examined in order to better meet customers' needs. Furthermore, customer representatives stated that a telephony service was inappropriate for some customers who might not be able to, or might not feel comfortable with, contacting the BDC in this way. As one customer representative commented:

> *'It's all very well telling someone that you'll ring them back on their mobile or you'll ring them back at home, but if they don't have access to the phone, if they're using an intermediary agency to do that or if they're using a friend's phone or if they're standing in a phone box…it's completely impractical.'*

(Customer representative)

According to customer representatives, some Jobcentre Plus customers have difficulty getting through to BDC telephony teams, often waiting on hold for extended periods of time or being cut off during busy periods.

As one customer representative described:

> *'On a good day we may get through eventually, but you do have to wait, on a bad day you pick up a recording saying "We are very busy at the moment, please phone back later" and they cut you off…now that can be very, very frustrating and annoying…'*

> (Customer representative)

Customer representatives also said that the three-hour call-back target was rarely met.

The customers their organisations dealt with frequently had to provide original documentation to Jobcentre Plus as evidence to support their claim for benefit. However, customer representatives claimed that the handling of such documentation between local offices and BDCs could cause problems for customers. They described instances where customers' documents had been lost in the post and questioned why customer documentation could not be forwarded to BDCs from local offices by courier.

Overall, reports from Jobcentre Plus staff and customer representatives suggest that there is still scope for improving the relationship between BDCs and Jobcentre Plus local offices. The use of 0845 numbers, call-waiting and call-back times, and the use of the shared diary system were all identified as problems that need attention to ensure that Jobcentre Plus customers receive a high standard of service.

3.7   Conclusions

Awareness of AJCS varied substantially across BDCs, although the majority of BDC staff were aware of AJCS processes. The differences in the levels of awareness were due to a number of factors including the member of staff's role, how long they had worked at the BDC and the amount of AJCS-specific training they had received. Like Jobcentre Plus local office staff, BDC staff were generally aware of the reasons behind the introduction of AJCS. However, no one person listed all the reasons for its implementation as outlined by Jobcentre Plus. This in turn may help to explain why local office relations with BDCs were seen as problematic by both local office staff and customer representatives. The use of shared diaries, differences in terminology, staff awareness of the benefits system as a whole, and the level of training provided to BDC telephony staff were all highlighted as issues in need of reassessment to ensure that customers received the best possible service.

Nonetheless, the majority of enquiries to BDCs were resolved without an appointment at a local office being made. Staff at BDCs said that they only needed to redirect customers to Jobcentre Plus local offices when further information or documentation was required. However, according to local office staff, the process

of handing on between BDCs and the local office could be a problem for some customers. There were reports of instances where customers had been passed between local offices and BDCs a number of times before their enquiry had been dealt with. This could undermine the ability of Jobcentre Plus to provide an efficient and effective service to customers.

Some staff felt that the level of expertise needed in order to deal with customer enquiries effectively was not reflected in the guidance provided by Jobcentre Plus. The customer representatives also suggested that, whilst BDC telephony staff were able to deal with straightforward queries, customers with more complex enquiries might find it harder to receive a full response from telephony staff. BDC staff, like local office staff, generally used a combination of AJCS guidelines and their own judgement to identify vulnerable customers. The same approach was used when deciding the duration of an appointment. However, some local office staff felt that insufficient time could be allocated to some appointments.

The use of the 0845 number by Jobcentre Plus was raised as an issue by local office staff, customer representatives and BDC staff. Many of the reported negative responses from customers related to the cost of the call to the BDC. On the other hand, some BDC staff felt this charge was not an issue as they usually called the customer back in order to minimise the amount of time the customer spent on the telephone. However, local office staff and customer representatives see these 'call-backs' as equally problematic. According to customer representatives the target response time of three hours was rarely met and this could cause frustration. Forum area staff also said that customers waiting for call-backs from BDCs frequently became agitated or frustrated with the quality of service they were receiving.

4 Conclusions

4.1 Introduction

This report provides early feedback on the national roll-out of the Accessing Jobcentre Plus Customer Services (AJCS) project and examines whether it is operating as intended. Specifically, the study:

• examines whether customers are using the most appropriate service channel;

• examines if there has been an improvement in the management of unappointed footfall;

• examines whether AJCS has encouraged a standardised delivery of service across Jobcentre Plus;

• examines whether the roll-out (including the communications and guidance provided) was successful;

• examines how customers and staff have responded to the model; and

• identifies examples of good and bad practice.

These aspects of the service are discussed in turn in the following sections.

4.2 Directing customers to appropriate channels

Jobcentre Plus local office staff said that they believed that in general customers were using the most appropriate channels to resolve their enquiries. After some initial resistance, the majority of customers were now seen as using self-service facilities. In fact, some staff suggested that customers preferred being able to contact the relevant teams, for example, Benefit Delivery Centres (BDCs), directly. However, staff also said that some customers who were able to use the self-service facilities, nevertheless requested face-to-face assistance with their enquiry. Older people, people with English as a second language and people without prior experience with Jobcentre Plus services were given as examples of customers who needed to be encouraged by staff to use the self-service facilities.

This evaluation, however, did not include interviewing customers directly, and so customers' experiences of, and attitudes towards, the self-service channels are not known in full.

4.3   Managing unappointed footfall

It is difficult to identify the impact of the introduction of AJCS on the management of footfall in local offices due to the increase in the volume of customers caused by the economic downturn. However, some staff stated that the increase in customers would not have been manageable without the introduction of AJCS. This claim is difficult to assess in quantitative terms as there is a lack of management data on customer flows in Jobcentre Plus local offices, and no comparison site where AJCS was not being implemented (a counterfactual) to compare what would have happened in the absence of AJCS.

AJCS Stage 1 staff agreed that overall, the volume of customers using Jobcentre Plus had increased because of the economic downturn. However, their views on changes in the level of unappointed footfall were more mixed. Some thought unappointed footfall had increased, some that it was unchanged and others that it had decreased. Given differences in the performance of local labour markets and in the composition of clients groups, and in the management of footfall in local offices, it is possible that all three perceptions were (at the local level) factually correct. Increases in unappointed footfall were attributed to the increase in the rate of unemployment. Whilst falls, or no change, in unappointed footfall were perceived as due to:

• customers learning to use the self-service facilities and (after an initial period) adapting to the new procedures; indeed, some customers were believed to prefer having 'ownership' of their interactions with Jobcentre Plus that AJCS offered;

• active management of the forum area, which included some people being turned away from using local office facilities or being unable to be accompanied by a friend/relative when visiting the office;

• factors external to AJCS, such as the location of the local office or a change in the services provided (such as no longer being an office administering Social Fund crisis loans).

Customer representatives, however, said that the management of unappointed footfall in Jobcentre Plus offices might cause problems for some customers. They argued that by discouraging customers from going into local offices, Jobcentre Plus had made its services less accessible to customers who were not aware of the process or did not feel comfortable contacting the BDC directly and that sometimes customers were being refused access to jobsearch facilities by Customer Care Officers.

At Stage 2 some staff argued that AJCS has had a positive effect on the management of unappointed footfall as they now saw fewer customers as more customers were encouraged to deal with their own enquiry before they reach this stage. Other Stage 2 staff claimed that there had been no change in the level of footfall.

4.4 Standardised service delivery

In some areas AJCS had introduced a degree of standardisation in service delivery. For example, local office staff offered less face-to-face support to customers and focused primarily on supporting vulnerable customers. Additionally, forum area staff said that they were redirecting more customers to self-service facilities since the introduction of AJCS.

However, there was also variation in how AJCS had been implemented across offices. Job roles were structured differently. For example, in some (smaller) offices one member of staff performed the role of both Customer Support Officer (CSO) (Appointments) and CSO (Interviews). The interpretation of the role of Customer Care Officer also varied across offices with some staff playing a more active role in dealing with customer enquiries than others.

As described above, the management of unappointed footfall differed between offices. Some offices tried to control the volume of customers in the forum area, for health and safety reasons, by only allowing entrance to those with appointments, and staff in some local offices denied access to family and friends accompanying customers to make the forum area more manageable. This departs from AJCS, which aims to encourage customers to use the self-service facilities and although it aims to encourage customers to make appointments, does not remove the availability of face-to-face assistance without an appointment.

The approach to identifying vulnerable customers also varied across offices. Staff tended to use a combination of the guidelines and their own judgement when identifying vulnerable customers. Although the identification of vulnerable customers by staff will inevitability involve the exercise of subjective judgement, the evaluation's findings do raise the issue of whether staff were being required to exercise too much discretion in a relatively short period of time. This could affect the standardisation of service delivery.

Two different approaches to vulnerability underpin the views of staff and customer representatives. The former have a 'relativist' approach to vulnerability; whether someone was 'vulnerable' is situational, it depends upon their behaviour and circumstances at a particular point in time. The latter included a more 'absolute' approach; vulnerability was a status that applied for an extensive period of time; in some cases a time invariant personal characteristic. Both these approaches have their advantages and disadvantages. For instance, once identified as vulnerable the absolutist approach should be easier to administer – as vulnerable people's records could be tagged – but the relativist approach is possibly less likely to lead

to an approach towards customers that they find demeaning, even paternalistic. However, the major concern about the approach currently adopted by staff is that in exercising their discretion they may be missing people whose vulnerability is hidden. Moreover, past experience of a customer is not necessarily a reliable indicator of whether or not they are currently in priority need. The current approach used by Jobcentre Plus staff risks 'false negatives', customers who are vulnerable were not identified as such, and 'false positives'; people might have received assistance at Stage 2 or 3 who did not need it. In either case the implication is that Jobcentre Plus resources were not being used efficiently.

This variation in service delivery is not necessarily problematic. Some variation in delivery is to be expected. It would be unrealistic, given local variation in labour markets and office arrangements, for a wholly uniform service to be delivered. However, whilst overall, the standard of service delivery appears to be adequate, there are key questions about how vulnerable customers were identified (see above) and the nature of the relationship between local offices and BDCs (see below).

4.5   Guidance, communications and training

Jobcentre Plus staff in local offices and BDCs said that they were reasonably satisfied with the communications and guidance they had received and felt that the roll-out had been generally successful. However, staff highlighted some issues that they felt needed to be reviewed. For example, both local office and BDC staff said that their defined roles and responsibilities did not fully reflect the level of expertise or experience that the role required. Some BDC staff also said that there was a need for further training on the benefits system and the work of Jobcentre Plus as a whole in order to ensure they could provide the best possible service. Some staff said that the lack of clear guidance on the standard amount of customer information that needs to be entered into the shared appointments diaries might lead to inaccurate customer information being provided. Additionally, confusion regarding how to book customer appointments might, according to staff, create problems of 'double booking'.

Customer representatives, however, felt that the training had not equipped Jobcentre Plus staff to provide the best service to customers in all circumstances. Customer representatives expressed particular concern that Jobcentre Plus' disability awareness training did not fully equip staff to deal effectively with all types of disability issues. Furthermore, customer representatives argued that the guidelines provided by Jobcentre Plus overlooked the complexity of some enquiries that staff dealt with. Customer representatives said that by providing what was seen as limited guidance to staff, AJCS made it difficult for customers with less straightforward problems to always have their enquiries dealt with efficiently and effectively.

4.6 Staff and customer responses

In general, local office staff understood the aims and procedures outlined in the AJCS guidance. Although most staff were aware of some of the reasons why AJCS was introduced, the majority were not aware of all the reasons behind the change. Moreover, awareness of the terminology of AJCS varied across BDC staff. Some BDC staff said that they had not come into contact with the term before the time of the evaluation interview.

Customer representatives said that customer responses to the introduction of AJCS had been less positive than those suggested by staff. Some customers felt frustrated when their enquiries were handed on from one person to another without a resolution. Customer representatives said that some customers without obvious vulnerabilities or who did not identify themselves as being vulnerable might feel that their vulnerabilities had been overlooked or dealt with inappropriately. These views may reflect, in part, that the customer representatives' organisations dealt with customers who had more complex circumstances and/or were more likely to have had problematic contact with Jobcentre Plus than other customers.

In addition, the use of an 0845 number by BDCs was, according to customer representatives, viewed negatively by customers. Staff also reported that customers could be highly critical of the 0845 number.

4.7 'Lesson learning' from AJCS

The evaluation identified areas of both 'good' and 'bad' practice. In terms of good practice, staff in local offices and BDCs used a combination of AJCS guidance and their own experience to identify the most appropriate way of meeting customers' needs. This allowed for a more flexible, informed approach to AJCS which closely adhered to the guidelines but also took into account staff expertise. However, the reliance on staff experience and judgement to identify vulnerable customers might have overlooked customers with vulnerabilities that were not immediately apparent.

In accordance with AJCS some Customer Service Managers (CSMs) introduced customers to the self-service facilities and demonstrated the benefits of using these systems, rather than just directing them to these channels. Moreover, different teams within Jobcentre Plus, for example, forum area staff and CSOs, or local office and BDC staff, liaised with each other and passed on information about customers in order to ensure that the customer received the most appropriate service. In some instances forum area staff liaised with BDC telephony teams on behalf of customers whose vulnerabilities might not be easily identifiable over the telephone.

In addition, Customer Care Officers said that, since the introduction of AJCS, they had become more embedded in the work of Jobcentre Plus. They were now included in Jobcentre Plus local office staff meetings. Customer Care Officers said

that this had helped to ensure more coordinated management of the forum area as they were now more aware of how the office as a whole was managed. Staff thought that the more proactive role of Customer Care Officers was an important factor in the speedy and effective identification and management of risks.

However, the evaluation also identified some examples where practices could be improved. In some cases efforts to minimise footfall in Jobcentre Plus local offices had led to offices restricting entry to customers with appointments only or refusing entry to those accompanying customers. This may cause problems for vulnerable customers who might wish to be accompanied by a family member or friend to support them (see above).

For customer representatives the role of Customer Care Officer had been interpreted incorrectly in some offices. In addition, in some cases Customer Care Officers undertook activities that fell outside their remit, for example taking signing-on books off customers and taking them to staff.

Relations with BDCs were raised as a cause of tension by both local office staff and customer representatives. Issues identified included high staff turnover and available staff resources in BDCs, training provided to telephony teams, differences in terminology, and insufficient or inaccurate customer information in the shared diaries. Local office staff felt that these factors could lead to inconsistencies in the service provided to customers.

Furthermore, call waiting times for BDC telephony services and (as already mentioned) the use of an 0845 number were also highlighted as examples of bad practice by customer representatives and Jobcentre Plus local office staff, who argued that these often led to increased queues in local offices as customers would visit the office to avoid the cost of the call. Some CSMs described how customers were sometimes left on hold for prolonged periods of time before being cut off.

4.8   Recommendations

The evaluation has identified areas where the system is working well and other areas where it is working less well. Jobcentre Plus should consider the following to improve service delivery to customers:

- Reviewing the role and responsibilities of Customer Care Officers to provide consistent public access to services across Jobcentre Plus local offices.

- Reviewing the approach to and associated staff guidance for the identification of vulnerable customers; in particular Jobcentre Plus should review how customers with 'invisible' priority needs might be assisted.

- Reviewing the relationship between local offices and BDCs; in particular, call-waiting and call-back times; training of staff; and what information should be entered in to the shared diary.

- Reviewing the cost of calls to BDCs.

- The number and characteristics of new claimants who have been made unemployed following the financial crisis has affected the implementation of AJCS. Staff have had to deal with large numbers of customers with limited experience of Jobcentre Plus and this has put pressure on both staff resources and the facilities available. Jobcentre Plus could explore when and what information about Jobcentre Plus is made available to people when they are made redundant and how new customers are served.

- The increased volume of customers made it difficult to evaluate the impact of AJCS on the management and level of unappointed footfall within local offices. At least for a trial period, data on the number of vulnerable customers within local offices should be collected. To complement this evaluation, research with customers using AJCS should be commissioned in order to triangulate their views and experiences with the perceptions of staff and customer representatives.

Appendix A
AJCS staff roles

The main AJCS roles of Jobcentre Plus local office staff are outlined in Table A.1.

Table A.1   AJCS staff roles

Job Title	Role within AJCS
Customer Care Officer	- Provide directional guidance - Manage office environment - Distribute leaflets - Intercept problematic customers
Customer Service Manager	- Welcome customers and visitors in line with Jobcentre Plus Customer Service Standards - Manage forum area - Identify and sensitively handle vulnerable customers - Signpost customers, in less than one minute, to most appropriate channel - Promote jobsearch activity - Monitor flow of customers and identify trends
Customer Support Officer (Appointments)	- Provide support for vulnerable customers to access services - Deal with brief enquiries - Manage the Customer Support Appointment and Payment Diary
Customer Support Officer (Interviews)	- Establish reason for interview and research relevant jobsearch activities - Identify specific customers and consult appropriate experts - Advise and educate customers about the benefits of using preferred channels
Customer Support Team Leader	- Manage Customer Support Officers - Manage services to vulnerable customers - Ensure facilities and information are available to allow Customer Support Officers to effectively promote jobsearch activity

Appendix B
Jobcentre Plus local office staff topic guides

Customer Service Managers

GENERAL QUESTIONS

1   Job role and working environment

1.1   What is your job title?

1.2   Have you worked in a BDC?

1.3   If a colleague asked you why had AJCS been introduced what would you say?

1.4   Has the introduction of AJCS affected your role? If so, in what ways?

1.5   How would you describe the Jobcentre Plus environment before AJCS was introduced? (*Prompt: behaviours of customers; health and safety; footfall; queues*). Have you noticed any changes to your working environment since the introduction of AJCS? If, so what?

1.6   How do you feel Jobcentre Plus staff have responded to the introduction of AJCS? (*Prompt: has it been an easy/difficult transition? Have they responded well to changes in roles/duties? Do they feel they would have benefited from more training?*)

2   Interaction with customers

2.1   Has there been a noticeable change in unappointed 'footfall' since the introduction of AJCS? What do you do to manage unappointed footfall?

2.2   Do customers approach you for advice? What is the nature of their enquiry? What do you say to them? When you refer them on to another member of staff how do they react/what do they say?

2.3 Do you approach customers in the foyer? Does the nature of their enquiry differ from those who approach you? What do you say to them? When you refer them on to another member of staff how do they react/what do they say?

2.4 Has the amount of contact you have with customers changed since AJCS was introduced? If so, would you say this was due to AJCS? What other factors have influenced this? (*Prompt for increase in footfall*). What effect has this had on your role?

2.5 When the office is busy are there occasions when a Customer Service Manager might not be able to talk to a customer? What happens then?

2.6 How do you identify appropriate channels for customers? Were you given sufficient training/information to do this? Would further training/information have been useful?

2.7 What proportion of customer enquiries would you estimate are easy to deal with? What proportion are more problematic? What sort of enquiries are easy/more problematic to deal with? Why are some problematic?

2.8 Has Jobcentre Plus activity become more jobsearch-related since AJCS? Why do you say that?

2.9 How do customers respond when they are signposted to self-service channels? What proportion of customers would you say are already aware of the self-service channels when they enter the office? Are there particular channels that they say they (prefer to) use? (*Prompt for any variation by customer type/nature of enquiry*).

2.10 Do you think there is a perceived change in overall customer service since AJCS was introduced? (*Clarify if the perceived change has primarily been amongst staff or service users*).

2.11 How do you identify and reduce risk at the Jobcentre Plus office? Has this changed since the introduction of AJCS?

2.12 Has the number of 'incidents' in the office changed since the introduction of AJCS? If so, how and why?

3 Customers with a priority need

3.1 What proportion of your customers have a priority need?

3.2 How do you identify who has a priority need? What would you consider to be 'priority need'? Does Jobcentre Plus provide guidance on what is a priority need and how to identify someone with a priority need? If so, how useful is the guidance? What are the main problems in identifying someone with a priority need? What do you do if you are in doubt?

3.3 Is the classification of 'priority need' similar in the BDC?

3.4   How do staff deal with customers with English as a second language/visible disability?

3.5   Do you think that the service given to priority customers has changed since the introduction of AJCS? If so, has it improved or deteriorated? If so, in what ways and why? Can you identify any (further) improvements that could be made to the service to priority customers?

4   Relationship with Benefit Delivery Centre

4.1   How many referrals do you get from the BDC? What sort of enquiries does the BDC refer?

4.2   Do you refer many customers to the BDC? Has the number of referrals from and to the BDC changed since the introduction of AJCS?

4.3   How would you describe the relationship between local offices and the BDC? Has this changed since the introduction of AJCS? If changes have occurred, are they due to AJCS or other factors?

5   Strengths and weaknesses of AJCS

5.1   In your view what are the main strengths and weaknesses of AJCS? What areas could be improved?

5.2   To what extent do you feel the customer experience of Jobcentre Plus has changed since the introduction of AJCS? Why do you say that? (*Prompts: health and safety; customer incidents; queues/waiting times etc.*)

Close

Is there anything else you would like to add?

Thank you for your time.

Customer Support Officers (Appointments)

GENERAL QUESTIONS

1   Job role and working environment

1.1   What is your job title?

1.2   Have you worked in a BDC?

1.3   If a colleague asked you why had AJCS been introduced what would you say?

1.4   Has the introduction of AJCS affected your role? If so, in what ways?

1.5   Has the level of customer contact changed since introduction of AJCS? If so how much of this do you feel is due to the introduction of AJCS?

1.6   How would you describe the Jobcentre Plus environment before AJCS was introduced? (*Prompt: behaviours of customers; health and safety; footfall; queues*). Have you noticed any changes to your working environment since the introduction of AJCS? If so what?

1.7   How do you feel Jobcentre Plus staff have responded to the introduction of AJCS? (*Prompt: has it been an easy/difficult transition? Have they responded well to changes in roles/duties? Do they feel they would have benefited from more training?*)

2   Interaction with customers

2.1   Has there been a noticeable change in unappointed 'footfall' since the introduction of AJCS? What do you do to manage unappointed footfall?

2.2   Do you feel customers are being directed appropriately? (*Prompt: Are the customers you speak to unsuitable for self-service channels?*)

2.3   What proportion of the customers you see have an appointment made for them? What proportion have appointments made by the BDC?

2.4   For customers with **no** appointment: what is the nature of their enquiry, and could they have used the self-service channels?

2.5   For customers with an appointment: what is the nature of their enquiry, and could they have used the self-service channels instead?

2.6   What proportion of customers make more than one visit? What is the nature of these customers' enquiries? Are they similar? How do you deal with these customers?

2.7   What proportion of customer enquiries would you estimate are easy to deal with? What proportion are more problematic? What sort of enquiries are easy/more problematic to deal with? Why are some problematic?

2.8   Has Jobcentre Plus activity become more jobsearch-related since AJCS?

2.9 How do customers respond when they are signposted to self-service channels? What proportion of customers would you say are already aware of the self-service channels when they enter the office? Are there particular channels that they say they (prefer to) use? (*Prompt for any variation by customer type/nature of enquiry*)

2.10 Do you think there is a perceived change in overall customer service since AJCS was introduced? (*Clarify if perceived change is primarily amongst staff or customers*)

2.11 How do you measure customer satisfaction?

3 Customers with a priority need

3.1 What proportion of your customers have a priority need?

3.2 How do you identify who has a priority need? What would you consider to be 'priority need'? Does Jobcentre Plus provide guidance on what is a priority need and how to identify someone with a priority need? If so, how useful is the guidance? What are the main problems in identifying someone with a priority need? What do you do if you are in doubt?

3.3 Is the classification of priority need similar in the BDC? Do you feel there is continuity between the BDC's approach to vulnerable customers and the Jobcentre Plus local office's approach?

3.4 How do staff deal with customers with English as a second language/visual disability?

3.5 Do you think that the service given to priority customers has changed since the introduction of AJCS? If so has it improved or deteriorated? If so, in what ways and why? Can you identify any (further) improvements that could be made to the service to priority customers?

4 Tools

4.1 Is the information/facilities/support that you have access to sufficient? If not, what would help?

4.2 How often do staff use the shared diaries? How useful are the diaries? Why do you say that?

5 Relationship with Benefit Delivery Centre

5.1 Do you feel the system of 'shared diaries' between the local offices and BDC is working effectively? What changes do you think would improve their effectiveness?

5.2 How many referrals do you get from the BDC? What sort of enquiries do BDC refer?

5.3 Do you refer many customers to the BDC? Has the level of referrals from and to the BDC changed since the introduction of AJCS?

5.4 How would you describe the relationship between local offices and the BDC? Has this changed since the introduction of AJCS? If changes have occurred, would you say they are due to AJCS or other factors?

6 Strengths and weaknesses of AJCS

6.1 In your view what are the main strengths and weaknesses of AJCS? What areas could be improved?

7 Close

7.1 Is there anything else you would like to add?

Thank you for your time.

Customer Support Officers (Interviews)

GENERAL QUESTIONS

1 Job role and working environment

1.1 What is your job title?

1.2 Have you worked in a BDC?

1.3 If a colleague asked you why had AJCS been introduced what would you say?

1.4 Has the introduction of AJCS affected your role? If so, in what ways?

1.5 How would you describe the Jobcentre Plus environment before AJCS was introduced? (*Prompt: behaviours of customers; health and safety; footfall; queues*). Have you noticed any changes to your working environment since the introduction of AJCS? If so, what have these changes been? What do you feel has changed the most?

1.6 How do you feel Jobcentre Plus staff have responded to the introduction of AJCS? (*Prompt: has it been an easy/difficult transition? Have they responded well to changes in roles/duties? Do they feel they would have benefited from more training?*)

2 Interaction with customers

2.1 Has there been a noticeable change in unappointed 'footfall' since the introduction of AJCS? How do you manage unappointed footfall?

2.2 Do you feel customers are being directed appropriately? (*Prompt: Are the customers you speak to unsuitable for self-service channels?*)

2.3 What proportion of the customers you see have an appointment made for them? What proportion have appointments made by the BDC?

2.4 What types of enquiries/issues do you deal with? What happens to customers after they have seen you?

2.5 What proportion return for a further interview with a CSO? Why can more than one interview be required? What proportion return to the office but see a colleague in the office?

2.6 What proportion are referred to a self-service channel? *(Prompt for channels used)*. Of these, could some have used the channel without having an interview? Why do you say that?

2.7 What proportion of customers make more than one visit? What is the nature of these customers' enquiries? Are they similar? How do you deal with these customers?

2.8 What proportion of customer enquiries would you estimate are easy to deal with? What proportion are more problematic? What sort of enquiries are easy/more problematic to deal with? Why are some problematic?

2.9 Has Jobcentre Plus activity become more Jobsearch related since AJCS?

2.10 How do customers respond when they are signposted to self-service channels? What proportion of customers would you say are already aware of the self-service channels when they enter the office? Are there particular channels that they say they (prefer to) use? (*Prompt for any variation by customer type/nature of enquiry*)

2.11 Do you think there is a perceived change in overall customer service since AJCS was introduced? (*Clarify if this change is perceived primarily by staff or by customers*)

2.12 How do you measure customer satisfaction?

3 Customers with a priority need

3.1 What proportion of your customers have a priority need?

3.2 How do you identify who has a priority need? What would you consider to be 'priority need'? Does Jobcentre Plus provide guidance on what is a priority need and how to identify someone with a priority need? If so, how useful is this guidance? What are the main problems in identifying someone with a priority need? What do you do if you are in doubt?

3.3 Is the classification of priority need similar in the BDC? Do you feel there is continuity between the BDC's approach to vulnerable customers and the Jobcentre Plus local office's approach?

3.4 How do staff deal with customers with English as a second language/visual disability?

3.5 Do you think that the service given to priority customers has changed since the introduction of AJCS? If so, has it improved or deteriorated? In what ways and why? Can you identify any (further) improvements that could be made to the service to priority customers?

4   Tools

4.1   Is the information/facilities/support that you have access to sufficient? If not, what would help?

4.2   How useful are the diaries? Why do you say that?

5   Relationship with Benefit Delivery Centre

5.1   Do you feel the system of 'shared diaries' between the local offices and BDC is working effectively? What changes do you think would improve their effectiveness?

5.2   How many referrals do you get from the BDC? What sort of enquiries do BDC refer?

5.3   Has the level of referrals from and to the BDC changed since the introduction of AJCS?

5.5   How would you describe the relationship between local offices and the BDC? Has this changed since the introduction of AJCS? If changes have occurred, would you say they are due to AJCS or other factors?

6   Strengths and weaknesses of AJCS

6.1   In your view what are the main strengths and weaknesses of AJCS? What areas could be improved?

7   Close

7.1   Is there anything else you would like to add?

Thank you for your time.

Customer Support Team Leader

GENERAL QUESTIONS

1   Job role and working environment

1.1   What is your job title?

1.2   Have you worked in a BDC?

1.3   If a colleague asked you why had AJCS been introduced what would you say?

1.4   Has the introduction of AJCS affected your role? If so, in what ways?

1.5   How would you describe the Jobcentre Plus environment before AJCS was introduced? (*Prompt: behaviours of customers; health and safety; footfall; queues*). Have you noticed any changes to your working environment since the introduction of AJCS? If, so what?

1.6 How do you feel Jobcentre Plus staff have responded to the introduction of AJCS? (*Prompt: has it been an easy/difficult transition? Have they responded well to changes in roles/duties? Do they feel they would have benefited from more training?*)

2 Interaction with customers

2.1 Has there been a noticeable change in unappointed 'footfall' since the introduction of AJCS? What do you do to manage unappointed footfall?

2.2 Do you feel customers are being directed appropriately? (*Prompt: Are the customers you speak to unsuitable for self-service channels?*)

2.3 What proportion of the customers you see have an appointment made for them? What proportion have an appointment made by the BDC? Has this level changed since introduction of AJCS?

2.4 What is the nature of the enquiries you deal with? Why do you intervene? What tends to happen when you intervene?

2.5 What proportion of customer enquiries would you estimate are easy to deal with? What proportion are more problematic? What sort of enquiries are easy/more problematic to deal with? Why are some problematic?

2.6 Is the information/facilities/support that you have access to sufficient? If not, what would help?

2.7 Has Jobcentre Plus activity become more jobsearch-related since AJCS?

2.8 How do customers respond when they are signposted to self-service channels? What proportion of customers would you say are already aware of the self-service channels when they enter the office? Are there particular channels that they say they (prefer to) use? (*Prompt for any variation by customer type/nature of enquiry*)

2.9 Do you think there is a perceived change in overall customer service since AJCS was introduced? (*Clarify if perceived change is primarily amongst staff or customers*)

2.10 How do you measure customer satisfaction?

3 Customers with a priority need

3.1 What proportion of your customers have a priority need?

3.2 How do you identify who has a priority need? What would you consider to be 'priority need'? Does Jobcentre Plus provide guidance on what is a priority need and how to identify someone with a priority need? If so, how useful is the guidance? What are the main problems in identifying someone with a priority need? What do you do if you are in doubt?

3.3 Is the classification of priority need similar in the BDC? Do you feel there is continuity between the BDC's approach to vulnerable customers and the Jobcentre Plus local office's approach?

3.4 How do staff deal with customers with English as a second language/ visual disability?

3.5 Do you think that the service given to priority customers has changed since the introduction of AJCS? If so, has it improved or deteriorated? If so, in what ways and why? Can you identify any (further) improvements that could be made to the service to priority customers?

4   Relationship with BDC

4.1 How many referrals do you get from the BDC? What sort of enquiries do BDC refer?

4.2 How many customers do you refer to the BDC? Has the number of referrals from and to the BDC changed since the introduction of AJCS?

4.3 How would you describe the relationship between local offices and the BDC? Has this changed since the introduction of AJCS? If changes, are they due to AJCS or other factors?

5   Strengths and weaknesses of AJCS

5.1 In your view what are the main strengths and weaknesses of AJCS? What areas could be improved?

6   Close

6.1 Is there anything else you would like to add?

Thank you for your time.

Customer Care Officers

GENERAL QUESTIONS
1   Job role and working environment

1.1 What is your job title?

1.2 Have you worked in a BDC?

1.3 If a colleague asked you why had AJCS been introduced what would you say?

1.4 Has the introduction of AJCS affected your role? If so, in what ways?

1.5 How would you describe the JC environment before AJCS was introduced? (*Prompt: behaviours of customers; health and safety; footfall; queues*). Have you noticed any changes to your working environment since the introduction of AJCS? If, so what?

2   Interaction with customers

2.1   Has there been a noticeable change in unappointed 'footfall' since the introduction of AJCS? What do you do to manage unappointed footfall?

2.2   Do customers approach you for advice? What tends to be the nature of their enquiries? What do you say to them? When you refer them on to another member of staff how do they react/what do they say?

2.3   Has the amount of contact you have with customers changed since AJCS was introduced? If so, would you say this was due to AJCS? What other factors have influenced this? (*Prompt for increase in footfall*). What affect has this had on your role?

2.4   Do you have any leaflets to give to customers?

2.5   Are there many 'incidents' involving customers? What are the most common sort of incident? How serious are these incidents? How are they resolved?

2.6   Has the number or type of 'incidents' in the office changed since the introduction of AJCS? If so how? Why do you think this is?

2.7   How do you identify potential risks/problems?

2.8   How do you deal with potential risks/problems?

2.9   How do you deal with customers who are behaving inappropriately?

2.10 What support do you have?

2.11 What guidance do you have for dealing with customers who are behaving inappropriately? How useful is the guidance? What training have you received for dealing with customers who are behaving inappropriately? How useful is the training?

2.12 What further improvements do you think could be made to (further) reduce the number of incidents in the foyer/office?

3   Strengths and weaknesses of AJCS

3.1   In your view what are the main strengths and weaknesses of AJCS? What areas could be improved?

4   Close

4.1   Is there anything else you would like to add?

Thank you for your time.

Appendix C
Benefit Delivery Centre staff topic guides

Benefit Delivery Team telephone topic guide

1   GENERAL QUESTIONS

1.1   How long have you been working at the BDC? And have you ever worked in a local office?

1.2   Has the introduction of AJCS affected your role? In what way?

1.3   If a colleague asked you why had AJCS been introduced what would you say?

1.4   How would you describe the relationship between local offices and the BDC? Has this changed since the introduction of AJCS? If so, are they due to AJCS or other factors?

1.5   What sort of enquiries do BDC staff have to deal with?

1.6   What proportion of customer enquiries would you estimate are easy to deal with? What proportion are more problematic? What sort of enquiries are easy/more problematic to deal with? Why do you think this is?

1.7   How do you identify vulnerable customers? Who do you class as vulnerable? Is there a standard classification used by the JC and BDC? Do you feel this is appropriate?

1.8   Is the information that you have access to sufficient? If not, what would help?

1.9   Are you able to deal with the volume of benefit enquiries? (*Prompt: staffing; resources*)

1.10 Do customers express views about using the telephone? What sort of things do they say (*prompt for pros and cons*)? Does this create any difficulties? Do you feel customers are happy with the service they receive? How do you gauge customer satisfaction?

1.11 How often do staff use the shared diaries?

1.12 How useful are the diaries? Why do you say that?

1.13 Do you feel the system of 'shared diaries' between the local offices and BDC is working effectively? What changes do you think would improve their effectiveness?

1.14 Overall, how useful is AJCS? Are there any customer or staff behaviours that might need to change to improve the system?

1.15 Are there any other changes in procedures or facilities that could be made to improve customer service?

1.16 Anything else you would like to add?

Thank you for your time.

Close

Appendix D
Observational research proforma

Research objectives and instructions

To observe the JC environment; the interactions between staff and customers; how well AJCS is working in terms of making JC service more efficient and minimising 'footfall'; and to monitor what health and safety issues arise in JC and how these are dealt with by staff. Researchers should have NO CONTACT with JC staff/customers during observation. Please use proforma as a guide and include any other potentially relevant notes in the space provided.

JC location:

Date of observation:

Time:

1. How is this office laid out? (*please label public area/area accessible by appointment only/entrance/reception point/other in box provided*)

2. How many:

   - Reception points (AJCS Stage 1)?

   - Self-service computers?

   - Phones?

   - Seats?

3. Are staff members easily identifiable?

4. How many staff members are there at the start of the observational period?

5. Are staff roles easily identifiable?

6. Is the reception point (AJCS Stage 1) clearly marked?

7. What are staff doing during observation period (i.e. walking around the foyer, standing by JC door)?

8. Do staff approach customers during observational period?

9. Are there any times when there are no staff in the foyer during the observation period? Approximately how long do these periods last?

10. Does the volume of customers increase during the observational period? Do staff appear to be able to manage with the number of customers?

11. Does the number of staff in the foyer increase during the observation period?

12. Are there any 'peaks and troughs' of footfall during the observation period?

13. Are there any queues during the observation period?

14. Where do customers appear to congregate the most? At the:

   - Reception point?

   - Self-service computers?

   - Phones?

   - Other?

15. Did the observer witness any raised voices, intimidating behaviour or other 'incidents' during the observation period?

Notes:

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In recent years Jobcentre Plus has introduced a number of initiatives to improve the delivery of services to customers. There has been a rapid expansion in the use of telephony and web-based services, and so the number of 'channels' through which people can access Jobcentre Plus services has increased. The Accessing Jobcentre Plus Customer Services (AJCS) model was introduced into offices to help deal with rising levels of unappointed footfall and to help customers utilise the service channel that best meets their needs.

This report provides early feedback following the national roll-out of AJCS and examines whether the model is operating as intended. Staff interviews and observations as well as consultation with Customer Representative Groups inform the evaluation.

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