



Department  
for Work &  
Pensions

# An evaluation of the Jobseeker's Allowance (JSA) Online Digital Trailblazers (One, Two and Three)

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May 2013

## **In-House Research No 15**

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## **An evaluation of the Jobseeker's Allowance (JSA) Online Digital Trailblazers (One, Two and Three)**

The government aims to become 'digital by default' by providing 'digital services that are so straightforward and convenient that all those who can use them will choose to do so whilst those who can't are not excluded.'<sup>1</sup> The Department for Work and Pensions (DWP) recognises that supporting people to get online can contribute to the Department's objectives around supporting people into work and tackling poverty.<sup>2</sup>

The Jobseeker's Allowance (JSA) Online service, enabling claimants to make their JSA claims online, has existed since 2009. The Department has set out an ambition to increase the proportion of JSA claims made online to 80 per cent by September 2013. In May 2012, three Trailblazers were launched to test different approaches to help drive up the take-up of JSA Online.

The evaluation found that JSA Online take-up increased in all three Trailblazers (by between 2.0 and 5.8 percentage points more than the average increase in take up in non-Trailblazer districts over a 12 week period). There were no large scale operational impacts in the Trailblazer districts at the level of additional online take-up observed, and the opportunity to claim online was generally regarded positively, although channel choice is important to claimants. Online claimants had a good experience of using JSA Online and those who experienced problems that prevented them from claiming online said they would try again in future.

The following recommendations are made:

- The Trailblazers led to a modest increase in JSA Online take-up. Other methods may be needed to meet the Department's JSA Online take-up aspiration of 80 per cent by September 2013, and make the step change to be 'digital by default.'
- Further research and analysis is required to determine the longer term resource and customer experience impacts of a much higher take-up of JSA Online.
- The Department should take care to ensure that those genuinely unable to claim online are not disadvantaged.
- The design and usability of online forms is important to ensure that those who are keen to claim online are not discouraged.
- Some claimants do not wish to claim online, either due to a lack of skills or a preference for human contact. Other methods are needed to help persuade more reluctant claimants to claim online, and non-digital channels should remain for those genuinely unable to claim online.

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<sup>1</sup> Government Digital Strategy (November 2012)  
<http://publications.cabinetoffice.gov.uk/digital/strategy/> (Cabinet Office)

<sup>2</sup> DWP Digital Strategy (December 2012)  
[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/139489/dwp-digital-strategy.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/139489/dwp-digital-strategy.pdf) p.2

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## About the authors

Faye Clitheroe, Phil Cook and Steven Tulloch are analysts at the Department for Work and Pensions.

# Abbreviations

ADS	Atomic Data Store
ESA	Employment and Support Allowance
IAD	Internet Access Device
IB	Incapacity Benefit
IS	Income Support
IT	Information Technology
IVR	Interactive Voice Response
JSA	Jobseeker's Allowance
MISP	Management Information Systems Programme
NJI	New Jobseeker Interview
WFI	Work Focused Interview

# Glossary of terms

Digital Champions	Jobcentre Plus staff who have taken on additional responsibilities to advocate the benefits of getting online, and encourage and inspire customers and colleagues to use online channels
First Contact Agents	DWP operational staff working in the Contact Centre who gather a claimant's information for their claim for benefit
Independent online claimants	Online claimants who claimed online independently of the Trailblazers
JSA Online Trailblazers	Tests in local areas to understand what drives take-up of JSA Online
Non-digital channels	Collective term for channels excluding the online channel. This includes telephone and face to face channels
Nudged online claimants	Online claimants who were persuaded online by the Trailblazer



# Summary

## Background

The government aims to become digital by default by providing ‘digital services that are so straightforward and convenient that all those who can use them will choose to do so whilst those who can’t are not excluded.’<sup>3</sup> The Government Digital Strategy states that ‘developing transactional services offers the greatest scope to improve efficiency and the customer experience.’ The Department for Work and Pensions (DWP) Digital Strategy<sup>4</sup> recognises that supporting more people to get online can contribute to the Department’s objectives around supporting people into work and tackling poverty, and that driving up the take-up of digital services can generate cost savings and free up staff time to give more intensive support to those who need it.

The JSA Online service, enabling claimants to make their JSA claims online, has existed since 2009 and is an example of a transactional digital service provided by DWP. Before its introduction, the standard method for claiming JSA was by telephone. Whilst this channel is still available, alongside other non-digital channels including face to face, the Department has set out an ambition to increase the proportion of Jobseeker’s Allowance (JSA) claims made online to 80 per cent by September 2013.<sup>5</sup> As part of a wider programme of work to meet this ambition, the Department has conducted a number of tests (referred to as the JSA Online Trailblazers) in local areas to understand what drives take-up of JSA Online claims.

Three Trailblazers were implemented in three separate districts on 25<sup>th</sup> May 2012 and ran for 12 weeks. These were:

- **Trailblazer One** – Tested the impact of staff re-directing and persuading callers to claim online instead, providing support where necessary
- **Trailblazer Two** – Tested the impact of an additional five (and later ten) minutes’ wait time on the telephone claim line
- **Trailblazer Three** – Tested the impact of providing an incentive for online claims by promising to prioritise the processing of online claims

In order to inform roll-out and to maximise learning for future digital services such as Universal Credit, DWP has conducted an evaluation of the Trailblazers, involving a quantitative strand to determine their impact on the proportion of new claims made via JSA Online, and a qualitative strand to uncover the views, behaviour and experiences of Jobcentre Plus operational staff and JSA claimants in the Trailblazer areas.

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<sup>3</sup> Government Digital Strategy (November 2012)  
<http://publications.cabinetoffice.gov.uk/digital/strategy/> (Cabinet Office)

<sup>4</sup> DWP Digital Strategy (December 2012)  
[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/139489/dwp-digital-strategy.pdf.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/139489/dwp-digital-strategy.pdf.pdf) (DWP) p.2

<sup>5</sup> Department for Work and Pensions (31 May 2012) *Business Plan 2012 - 2015*  
<http://www.dwp.gov.uk/docs/dwp-business-plan-may-2012.pdf>

# Findings

## Impact upon take-up of JSA Online

JSA Online take-up increased in all three Trailblazers by more than the average increase in take-up in non-Trailblazer districts over a 12 week period. Of the three approaches tested, Trailblazer One was the most successful, increasing JSA Online take-up by 5.8 percentage points, followed by Trailblazer Three with an increase of 3.1 percentage points. Trailblazer Two had the least impact with an increase of 2.0 percentage points overall.

The management information collected in Trailblazer One gave some information about claimants' preferences for making online claims, and some of the barriers to further take-up. 31 per cent of eligible claimants who initially elected to make telephone claims were persuaded to claim online by First Contact agents. Of this group, the majority declared themselves able to claim at home (55 per cent), with most of the remainder accessing the internet via friends and family (20 per cent) or third party providers (23 per cent). A small minority (2 per cent) opted to claim online at home, but with handholding support from First Contact agents.

24 per cent of Trailblazer One callers were ineligible to claim online. However Trailblazer One was the only design that specifically identified this group. In contrast the approaches of Trailblazer Two and Three impacted all callers, whether or not they were eligible to claim online.

## Operational impacts

The Trailblazers caused a number of operational impacts, but this varied by Trailblazer and type of operational site. Impacts were felt in the Trailblazer One Contact Centre, where First Contact agents experienced minor changes to their day to day activities because they were using a more flexible script to encourage eligible callers to claim online, although these changes were felt to be manageable. Calls made to the JSA Online Helpdesk were reported to have increased since the Trailblazers began, and whilst Helpdesk staff felt that they had the resources to take the calls, not all Helpdesk agents felt able to answer all queries.

Trailblazer Three involved prioritising the processing of online claims and so impacts were particularly felt in the Benefit Centres where these claims were processed. Staff felt that prioritising *online* claims had reduced the number of claims that they were individually able to process in a day. This was because a considerable proportion of the JSA claims made online were incomplete and so staff needed to spend time re-contacting claimants for further information in order to process their claim successfully. This is not an impact of the Trailblazers directly, as it is associated with the increase in JSA Online claims nationally. The resource impacts of this may increase as a larger proportion of claims are made online, and further work to understand this may be needed.

## **Impacts upon staff attitudes to claiming online**

Staff across the Trailblazer districts demonstrated awareness of the DWP digital agenda, being broadly aware of the target for 80 per cent of JSA claims to be made online by September 2013. Some were able to view this within the wider policy context around the future introduction of Universal Credit.

A widespread view amongst staff across all three delivery arms of Jobcentre Plus, was that providing the opportunity to claim online is positive, offering the claimant several advantages including convenience and improved customer service. Some were concerned that certain groups of claimants would not be able to claim online, and felt that how a claim is made should be up to the individual.

It was acknowledged that staff need to have a positive attitude towards claiming online and the right digital knowledge and skills to enable them to be confident in encouraging claimants to go online.

## **Claimant reactions to being directed online**

Reasons for making a claim online or by a non-digital channel varied by claimant group. *Independent online claimants* (who decided to claim online independently of the Trailblazer) claimed online because they felt it was easier and more convenient. *Nudged online claimants* had been persuaded to claim online by staff. Claimants who claimed by non-digital channels did so because they had experienced a problem claiming online, or because they preferred human contact, did not have access to the internet or did not have the skills to claim online. Some claimants did not mind being asked to claim online whilst others felt disappointed, and it was generally felt that people should have a choice as to whether or not to claim online.

There were no formal written complaints from claimants as a result of the Trailblazers. There were a few reported instances of verbal complaints or grievances in Jobcentres in Trailblazer One from claimants reporting that they had experienced problems with the online claim form (although this is not necessarily an effect of the Trailblazer) or who felt they were not able to claim online. These were reported to have been resolved without needing further escalation.

## **Claimant experiences of using JSA Online**

Online claimants generally had a positive experience of using JSA Online.

Non-digital channel claimants who had attempted to make their claim online had experienced problems that prevented or deterred them from making an online claim. Problems included their own internet crashing and not understanding the wording on the JSA Online claim form.

Staff and claimants identified a number of potential improvements which could be made to the JSA Online claim form, which included improving the question wording and increasing the number of mandatory fields on the online form. In November

2012, since the interviews were undertaken, a number of changes were made to the JSA Online claim form that addressed many of the concerns raised in this research.

Staff felt that a positive experience of claiming online would help encourage a claimant to make any future claims online. Online claimants generally felt they would claim online again, largely because they considered it to be convenient and easier. Some non-digital channel claimants said that they would claim online in future if the system or their own internet connection worked, if the question wording was clearer or if they could have support to do so, for example at the Jobcentre or from a family member. Others felt they would never claim online because they did not feel they had the skills or because they preferred to speak to someone.

## **How to further promote online claiming**

Staff and claimants suggested a number of ideas on what else DWP could do to promote claiming online. These ideas emphasised the importance of stronger and consistent messaging around claiming online and providing effective support to enable claimants to make their claims online.

## **Conclusions and recommendations**

JSA Online take-up increased in all three Trailblazers (by between 2.0 and 5.8 percentage points more than the average increase in take up in non-Trailblazer districts over a 12 week period). There were no large scale operational impacts in the Trailblazer districts at the level of additional online take-up observed, although shifts to JSA Online may not necessarily be accompanied by cost savings. The opportunity to claim online was generally regarded positively, although people felt they should have a choice in how to claim. Online claimants had a good experience of using JSA Online, and those who experienced problems that prevented them from claiming online said they would try again in future.

The following recommendations are made:

- The Trailblazers led to a modest increase in JSA Online take-up. Other methods may be needed to meet the Department's JSA Online take-up aspiration of 80 per cent by September 2013, and make the step change to be 'digital by default.'
- Further research and analysis is required to understand and determine the longer term resource impacts of a much higher take-up of JSA Online. Customer experience also needs to continue to be monitored as the volume of claims made online increases.
- The Department should take care to ensure that those genuinely unable to claim online are not disadvantaged.
- The design and usability of online forms is important to ensure that those who are keen to claim online are not discouraged.
- Some claimants do not wish to claim online, either due to a lack of skills or a preference for human contact. Other methods are needed to help persuade more reluctant claimants to claim online, and non-digital channels should remain for those genuinely unable to claim online.

# 1. Introduction and methods

## 1.1 Context

The government aims to become digital by default by providing ‘digital services that are so straightforward and convenient that all those who can use them will choose to do so whilst those who can’t are not excluded.’<sup>6</sup> The Government Digital Strategy states that ‘developing transactional services offers the greatest scope to improve efficiency and the customer experience’. The Department for Work and Pensions (DWP) Digital Strategy sets out how the Department will become digital by default by providing ‘high quality digital services people prefer to use.’<sup>7</sup> The Strategy recognises that supporting more people to get online can contribute to the Department’s objectives around supporting people into work and tackling poverty, and that driving up the take up of digital services can generate cost savings and free up staff time to give more intensive support to those who need it.

The JSA Online service, enabling claimants to make their JSA claims online, has existed since August 2009<sup>8</sup>, and is an example of a transactional digital service provided by DWP. Before its introduction, the standard method for claiming JSA was by telephone, and whilst this channel is still available, the Department has set out an ambition to increase the proportion of Jobseeker’s Allowance (JSA) claims made online to 80 per cent by September 2013.<sup>9</sup> As part of a wider programme of work to meet this ambition, the Department has conducted a number of tests (referred to as the JSA Online Trailblazers) in local areas to understand what drives take-up of JSA Online claims.

The JSA Online Trailblazers aim to:

- Provide opportunities to learn what has the greatest impact in encouraging claimants to go online;
- Identify which actions may support a step-change in the take-up of online claims for JSA;
- Identify actions that should be embedded into the business model for Universal Credit.

Three Trailblazers were implemented on 25<sup>th</sup> May 2012 and ran for 12 weeks. In order to inform roll-out and to maximise learning for future digital services such as Universal Credit, DWP has conducted an evaluation of the Trailblazers. A quantitative evaluation has been conducted to determine their impact on the

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<sup>6</sup> Government Digital Strategy (November 2012)  
<http://publications.cabinetoffice.gov.uk/digital/strategy/> (Cabinet Office)

<sup>7</sup> DWP Digital Strategy (December 2012)  
[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/139489/dwp-digital-strategy.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/139489/dwp-digital-strategy.pdf) (DWP) p.2

<sup>8</sup> Initially this service was for contributions based claimants only. Income based claimants could claim from November 2010 and Rapid Reclaims were included in December 2010

<sup>9</sup> Department for Work and Pensions (31 May 2012) *Business Plan 2012 - 2015*  
<http://www.dwp.gov.uk/docs/dwp-business-plan-may-2012.pdf>

proportion of new claims made via JSA Online, and a qualitative evaluation has been carried out to uncover the views, behaviour and experiences of Jobcentre Plus operational staff and JSA claimants in the Trailblazer areas.

Further Trailblazers have since been trialled in other areas, with emerging findings from this work informing their design. The scope of this report is an evaluation of Trailblazers One, Two and Three only. The aim of each Trailblazer is described in Table 1.1.

**Table 1.1 Descriptions of the Trailblazers**

<b>Trailblazer</b>	<b>Description</b>
One	Tested the impact of staff re-directing and persuading callers to claim online instead, providing support where necessary
Two	Tested the impact of an additional five (and later ten) minutes' wait time on the telephone claim line
Three	Tested the impact of providing an incentive for online claims by promising to prioritise the processing of online claims

In all three Trailblazer designs the telephony option to claim JSA was available to claimants who did not wish to use the online channel.

## 1.2 Trailblazer Design

The Jobcentre Plus network is divided geographically into 37 Districts. Each Trailblazer was run in a single Jobcentre Plus District, and involved a modification to the normal process by which telephone claims for Jobseeker's Allowance (JSA) are handled.

Normally calls to make JSA claims are handled by a single National virtual network, with calls being routed to any available First Contact agent. In a modification to this process claimants calling from the Trailblazer Districts were identified by their postcodes and routed to dedicated teams of First Contact agents supporting each Trailblazer. Splitting the calls in this way made it possible to record call statistics for each Trailblazer (call length, call abandonment rates).

There are two distinct phases of handling a call. Initially Interactive Voice Response (IVR) takes the claimant through a series of automated questions which ensure the call is routed to the correct line, depending on the type of call<sup>10</sup>. Then the First Contact agents in the Contact Centre will take claimants through a script.

### 1.2.1 Trailblazer One

Trailblazer One used a modification of this script to give First Contact agents the opportunity to explore with claimants how practical it was for them to claim online,

<sup>10</sup> In the case of JSA claims for instance, the IVR questions check that the claimant wants to make a new claim to JSA, rather than another benefit.

and to persuade them to try the online channel. Outcomes of these conversations were recorded in a call logger. The categories recorded are shown in Table 1.2.

**Table 1.2 Call Outcome Codes – Trailblazer One**

<b>Option 1</b>	Claimant to go online using own access and has been given the Helpdesk number
<b>Option 2</b>	Claimant to go online using access via family/friends and has been given the Helpdesk number.
<b>Option 3</b>	Claimant to go online using access via 3 <sup>rd</sup> Party Provider and has been given Helpdesk number
<b>Option 4</b>	Claimant to go online using own access but with handholding support from First Contact agent
<b>Option 5</b>	Claimant has no access or skills and claim taken by telephony.
<b>Option 6</b>	Claimant refuses to claim online and claim taken by telephony.
<b>Option 7</b>	Not eligible to claim online and claim taken by telephony. <i>(The main categories of ineligible claimants are: claimants under 18 or over state pension age, claimants making a claim for a date in the future, appointees claiming on behalf of someone else, those claimants who have claimed ESA within the last calendar month)</i>
<b>Option 8</b>	Call not appropriate - redirected (claimants who have dialled the wrong number, etc.)

The first four categories relate to different ways of being directed to online claims, depending on whether the claimant had their own internet access, accessed the internet via family or friends, or were referred to 3<sup>rd</sup> parties (e.g. libraries). These claimants were advised that a helpdesk facility was available, should they encounter any issues during the online claim process. The fourth category – “own access – handholding support given” refers to an option to guide claimants with their own internet access through the application process whilst on the telephone to an Agent.

## 1.2.2 Trailblazers Two and Three

Trailblazers Two and Three involved modifications to the IVR stage of the process, but no change to the script used by Contact Centres.

Trailblazer Two tested whether extended call waiting times would result in an increase in JSA Online take-up. Initially a five minute additional wait was trialled, but this was increased to ten minutes for the last three<sup>11</sup> weeks of the Trailblazer. During the IVR claimants received a message saying wait times would be at least five (later ten) minutes, and that to avoid waiting claimants could claim online at [www.direct.gov.uk](http://www.direct.gov.uk). Calls were then held in a separate queue for the indicated period, before joining the normal queue to speak to the next available agent. If claimants chose to hold, the message about waiting times was repeated at intervals.

In normal operation, outside the Trailblazer districts, claimants can naturally experience a wide spread of waiting times, depending on agent availability when they

<sup>11</sup> The ten minute wait was introduced on 31/07/2013, the second day of week ten.

make their call. For example Mondays tend to be busier than Fridays. Average waiting times are around two minutes, but it is possible for some claimants to wait 20 minutes or upwards during busy periods.

Trailblazer Three tested the impact of providing an incentive for online claims by promising to prioritise the processing of online claims. During the IVR claimants received a message saying JSA claims made online are processed as a priority over claims made over the telephone, and that they could claim online at [www.direct.gov.uk](http://www.direct.gov.uk). The recorded message was received by all callers in the Trailblazer Three district, including those ineligible to claim for JSA Online.

In all three Trailblazer designs the telephony option to claim JSA was available to claimants who did not wish to use the online channel.

## 1.3 Existing evidence base

### 1.3.1 Internet access

The proportion of households in Great Britain with an internet connection has increased from 77 per cent in 2011 to 80 per cent (21 million) in 2012,<sup>12</sup> and 43 million adults (85 per cent of the adult population) had used the internet by the third quarter of 2012.<sup>13</sup>

### 1.3.2 Views of claiming online

In April 2012, before the Trailblazers started, 23.7 per cent of JSA claims were made online.<sup>14</sup> Research shows that there may be scope to increase this proportion. JSA claimant insight from 2011<sup>15</sup> suggests that 38 per cent of existing JSA claimants had the internet skills, access and motivation to transact with the Department online. A further 18 per cent had the skills and access, but were not keen to transact online. This includes those who are already online. The research also found that 58 per cent of working non-claimants used online banking, in comparison to 29 per cent of JSA claimants.

A 2012 survey<sup>16</sup> of benefits and tax credits recipients found that 62 per cent would be willing to make an application for a benefit or tax credit online. Willingness to apply online was higher amongst JSA claimants (68 per cent). The survey also found that

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<sup>12</sup> ONS (2012) Internet access – households and individuals, 2012

[http://www.ons.gov.uk/ons/dcp171778\\_275775.pdf](http://www.ons.gov.uk/ons/dcp171778_275775.pdf)

<sup>13</sup> ONS (2012) Internet access quarterly update 2012 Q3

[http://www.ons.gov.uk/ons/dcp171778\\_286665.pdf](http://www.ons.gov.uk/ons/dcp171778_286665.pdf)

<sup>14</sup> Data on the percentage of JSA claims made online is published here:

[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/181381/jsa-claims-online-historical-data.xls](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/181381/jsa-claims-online-historical-data.xls)

<sup>15</sup> Williams, B. et al. (2011) *Developing an on-line service: Customer research into the benefits and likely uptake of Automated Service Delivery (Jobseeker's Allowance)* DWP Research Report 734

<http://research.dwp.gov.uk/asd/asd5/rports2011-2012/rrep734.pdf>

<sup>16</sup> Tu, T. and Ginnis, S. (2012) *Work and the welfare system: a survey of benefits and tax credits recipients* DWP Research Report 800 <http://research.dwp.gov.uk/asd/asd5/rports2011-2012/rrep800.pdf>



less than half of claimants had found out about government services online. Only 14 per cent said that they had put in a new claim for benefit online, although an additional 29 per cent said that they had not done this but would like to do it.

A qualitative study of digitally excluded<sup>17</sup> JSA, IS, IB and ESA claimants found that awareness of Jobcentre Plus digital services was low, and those who were uninterested in finding employment or thought that their health condition prevented them from working (typically receiving IS, IB or ESA) had little interest in using digital services.

Claimants who were interested in looking for work thought that Jobcentre Plus digital services should be made generally available online to enable access at home or through other organisations such as libraries. The research also found that JSA claimants were most interested in training on how to use Jobcentre Plus' digital services and the internet, whilst ESA, IB and IS claimants were much less interested unless they had a definite goal of finding work. None of the claimants interviewed as part of the research had made a claim online, and their views towards making a claim online were mixed. Some felt that applying online would be quicker and easier whilst others valued the reassurance and interaction provided by direct telephone contact.

Overall the existing evidence suggests that there is generally a willingness to claim benefits online, and the Trailblazers provide a useful opportunity to explore how claimants can be encouraged to claim online.

## **1.4 Aim of the evaluation of the JSA Online Trailblazers**

### **1.4.1 Evaluation success criteria**

The Trailblazers were evaluated against the following evaluation success criteria:

1. A statistically significant increase in the proportion of new claims made via JSA Online in the Trailblazer Districts in comparison with the control Districts.
2. The Trailblazer should not introduce significant operational burdens in Contact Centres, Benefit Centres or Jobcentres.
3. A positive customer experience including a minimal impact on customer complaints.

Data was also collected around staff awareness of and attitudes towards JSA Online and the DWP digital agenda, as it is known from other research that frontline staff play 'a crucial role in creating awareness and encouraging the use of other channels among claimants.'<sup>18</sup>

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<sup>17</sup> Digitally excluded customers are defined as 'individuals who never access the internet, or do so no more than three times a month, or who lack confidence in their internet skills,' from Adam et al. (2011) *Increasing digital channel use among digitally excluded Jobcentre Plus claimants* DWP Research Report 776 <http://research.dwp.gov.uk/asd/asd5/rports2011-2012/rrep776.pdf> p.1

<sup>18</sup> Adam, D. et al. (2011) *Increasing digital channel use among digitally excluded Jobcentre Plus claimants* DWP Research Report No 776 <http://research.dwp.gov.uk/asd/asd5/rports2011-2012/rrep776.pdf> p.43

A mixed method approach, involving the collection and analysis of quantitative and qualitative data, was adopted in order to investigate these criteria. The quantitative data aimed to show the overall impact of the Trailblazers, i.e. *what* happened and whether the Trailblazers increased the uptake of JSA Online, whilst the qualitative data aimed to explain *why* things happened by exploring people's views in depth. The aims of the quantitative and qualitative aspects of the evaluation are outlined in sections 1.4.2 and 1.4.3 respectively.

## 1.4.2 Quantitative evaluation aims

The aim of the quantitative strand of the evaluation was to answer the following questions:

- How effective were the Trailblazers in increasing take-up of JSA online?
- How did claimants respond to being directed to claim online?
- Were there any significant operational impacts of the Trailblazers?

The first question links to the first evaluation success factor, that there should be a measurable increase in the proportion of claimants using JSA online. The second two relate principally to the second evaluation success factor, understanding operational impacts in terms of claimant behaviour and other process impacts to ensure no additional operational burden has been introduced.

These findings are reported in chapter 2.

## 1.4.3 Qualitative evaluation aims

The overall aim of the qualitative strand of the evaluation was to identify the impacts of the Trailblazers on the behaviour and experiences of claimants and staff in relation to JSA Online, providing evidence in relation to evaluation success factors 2 and 3. This overarching aim was broken down into the following key research questions:

- What were the operational and resource impacts of the Trailblazers? (*Findings are reported in chapter 3.*)
- What were the impacts of the Trailblazers upon staff attitudes towards and knowledge of JSA Online? (*Findings are reported in chapter 4.*)
- What were the impacts upon claimant complaints, experiences and attitudes towards being asked or nudged to claim online? (*Findings are reported in chapter 5.*)
- How did claimants find the experience of using JSA Online and would they use it again? (*Findings are reported in chapter 6.*)
- What can DWP do to encourage more claimants to claim online? (*Findings are reported in chapter 7.*)

# 1.5 Methodology

## 1.5.1 Quantitative evaluation

### Data sources for JSA online take-up

DWP publishes data on JSA Online take-up as one of its Business Plan Transparency measures.<sup>19</sup>

This indicator measures the proportion of new JSA applications submitted online as a percentage of all JSA new claims received and recorded in the Jobseeker's Allowance Payment System (JSAPS).

It is known that the published JSA Online measure tends to understate the total number of claims completed online. This is because the online marker (which identifies that a claim has been completed online) can be lost for some claims where manual intervention is required by processing staff.

For the purposes of Trailblazer evaluation the same measure definition is used. However a different data source is used because of the need to obtain figures by week and District.<sup>20</sup> As a consequence totals do not exactly match the published figures.

### Evaluation Methodology

During 2012 JSA Online take-up increased in all districts as more claimants became aware of the channel. This national increase is driven by many factors, such as promoting the online channel on the DirectGov website (now known as GOV.UK), via interactions with Jobcentre staff, and word of mouth. This means a straightforward before and after comparison (including a clear bench mark) cannot be used for evaluation, as this would include the effects of this national increase.

Individual Jobcentre districts have different level of JSA Online take-up due to a range of demographic and awareness factors. The districts chosen for the Trailblazers represented a range of different levels of JSA online take-up. (Trailblazer One being significantly below average, Trailblazer Two being just above average, and Trailblazer Three significantly above average.)

The aim is to measure the additional increase in JSA Online take-up resulting directly from the Trailblazers. Noting that trends in JSA Online take-up are very similar across districts,<sup>21</sup> we do this using a “difference in difference”<sup>22</sup> approach shown schematically in Figure 1.1.

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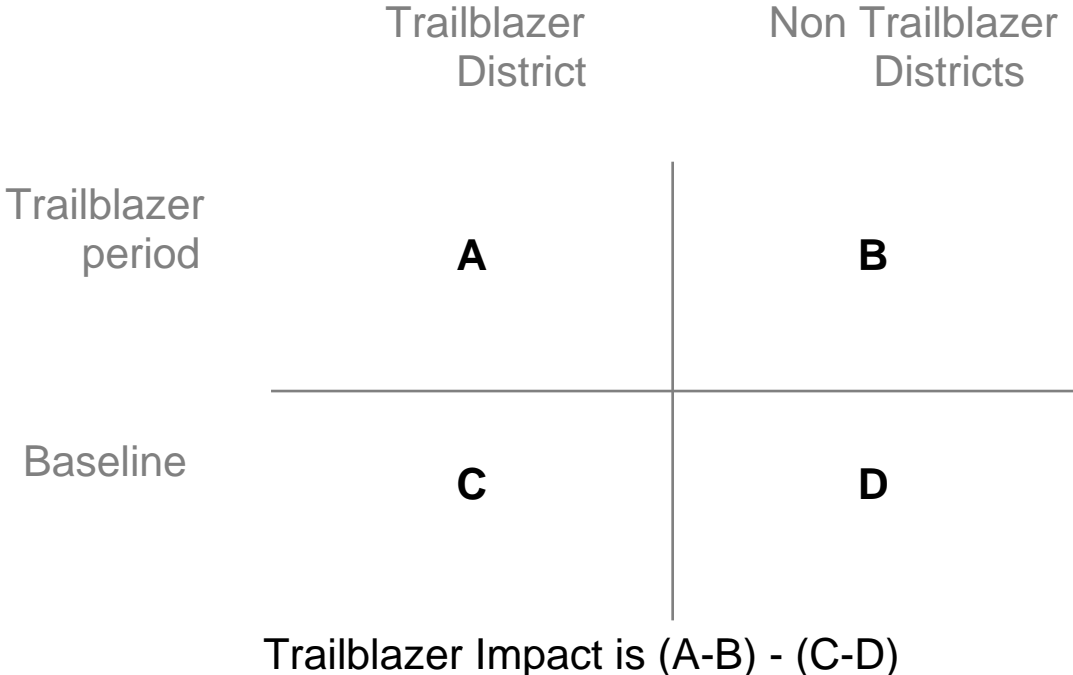
<sup>19</sup> <https://www.gov.uk/government/publications/dwp-business-plan-transparency-measures>

<sup>20</sup> The data source used is the Atomic Data Store, which provides an analyst's view of JSAPS data which is refreshed daily.

<sup>21</sup> Looking at the 12 months data prior to the Trailblazers, the correlation between Trailblazer District JSAOL and National Average JSAOL is over 90 per cent for each Trailblazer District.

<sup>22</sup> This method is described in the *Magenta Book*, HM Treasury 2011, p117, available online at: [http://www.hm-treasury.gov.uk/data\\_magentabook\\_index.htm](http://www.hm-treasury.gov.uk/data_magentabook_index.htm)

**Figure 1.1 Illustrating Difference in Difference methodology**



The difference in difference figure calculates how much the Trailblazer districts online take-up exceeds that of non-Trailblazer districts, adjusting for any differences that existed prior to the Trailblazer period. For example if A = 30 per cent, B = 25 per cent, C = 19 per cent, D = 20 per cent, then the increase is  $(30 \text{ per cent} - 25 \text{ per cent}) + (19 \text{ per cent} - 20 \text{ per cent}) = 5 \text{ per cent} - (-1 \text{ per cent}) = 6 \text{ percentage points}$ . This can equivalently be stated as how much JSA Online take-up in the Trailblazer district has increased, above the increase seen in non-Trailblazer districts. The methodology is described in more detail in Annex A, which also presents checks to ensure that the methodology can be appropriately applied here.

**1.5.2 Qualitative evaluation**

To complement the quantitative evaluation, qualitative research methods were employed to answer the research questions outlined in section 1.4.3.

The qualitative research involved 26 telephone interviews with front-line operational staff from a range of operational sites including Contact Centres, Jobcentres and Benefit Centres, and 35 telephone interviews with JSA claimants who had made claims either online or by a non-digital channel since the Trailblazers began.

The staff and claimant samples were chosen purposively to ensure that different types of staff and claimants were included to ensure that a wide variety of views could be captured and that main differences could be picked up. For example, staff interviews covered all of the job roles that were anticipated to be most greatly affected by the Trailblazers. Claimant interviews included those who had claimed online and those who had claimed by a non-digital channel from each of the three Trailblazer districts, and included a range of demographic backgrounds.

Semi-structured interview topic guides were developed in consultation with key stakeholders and used for all interviews. Interviews took place between June and September 2012. Further details of the qualitative methodology are provided in Annex B, and examples of the topic guides used can be found in Annex C and D.

### **Analysis and interpretation of qualitative data**

The rich qualitative data collected from the interviews provide an indication of the range of views held by the participants in this study only. The findings cannot be used to generalise to the wider populations of operational staff or JSA claimants. Where possible and evident, distinctions are made between non-digital channel and online claimants, but it is not possible or appropriate to make any statistical statements on the prevalence of a specific view within the population in scope.

In order to analyse the data, coding frameworks were developed for the staff and claimant interviews, which can be found in Annex E. The frameworks were strongly linked to the research questions to help ensure that the evaluation remained focused on the overarching evaluation aim. Each interview transcript was coded against the relevant framework. Once all transcripts had been coded, tables were produced to collate all of the evidence relating to a particular code. These tables were then used as a basis to inform and structure the report writing. Verbatim quotations are included within the report to illustrate points. Quotations from staff members are attributed as follows: (Type of operational site, Trailblazer number). Quotations from claimants are attributed as follows: (Claimant type, Trailblazer number).

## 2. Quantitative evaluation findings

### Summary

- All Trailblazers showed a statistically significant impact on increasing JSA Online take-up. However the increases measured were fairly modest.
- Trailblazer One showed the strongest impact of the approaches tested with an increase of 5.8 percentage points in JSA Online take-up over and above the increase observed in other districts. This shows that persuading callers to claim online and supporting claimants to locate local internet access is an effective approach to increase online take-up.
- In Trailblazer Two increasing waiting times resulted in a high number of abandoned calls, but only a small increase in online take-up of 2.0 percentage points over and above the increase observed in other districts.
- Trailblazer Three showed an increase of 3.1 percentage points over and above the increase observed in other districts, indicating that hearing a message about prioritising online claims does lead to some channel shift.

This chapter presents estimates of the average effect of the digital Trailblazers on the online uptake of claimants over and above the increase observed in other districts. As discussed in the methodology section, separate analysis has been performed for each Trailblazer. District JSA Online take-up is compared to average take-up for districts which were not part the Trailblazers. JSA Online take-up increased by 7.2 percentage points in non-Trailblazer districts during this period, and the analysis shows the additional increase due to each Trailblazer. The comparison is based on a 12 week baseline period compared to the 12 week Trailblazer period from 25th May until 17th August 2012.

Overall Trailblazer One was the most effective, followed by Trailblazer Three, with Trailblazer Two being the least effective at increasing take-up of JSA online. All Trailblazers had a statistically significant impact at the 95 per cent confidence level, however the result of Trailblazer Two should be treated with some caution.<sup>23</sup> The table and chart below compares the measured effect sizes for the three Trailblazers.

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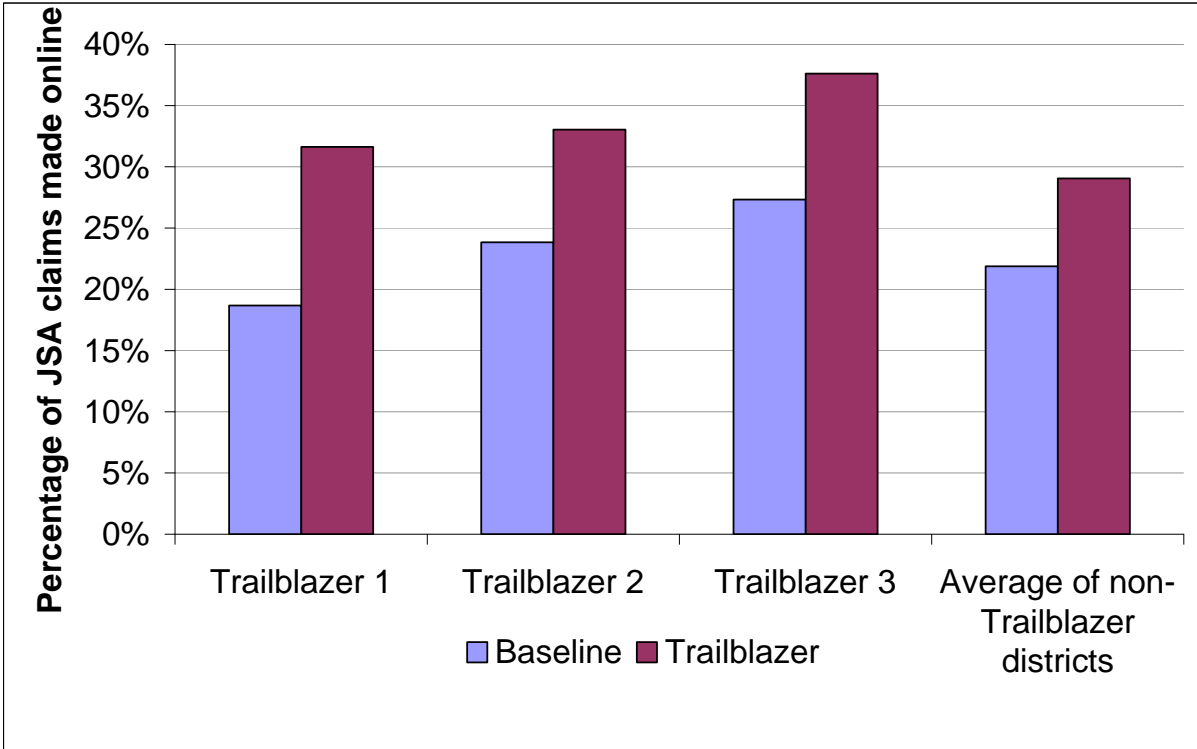
<sup>23</sup> See Annex A. In all cases, statistical significance is tested at the 95 per cent confidence level. The significance levels quoted here are calculated using a fairly simple approach which underestimates standard errors and confidence intervals; so that the results may not reach these levels of significance. In the Annex we show that effect sizes of 2 percentage points tend to occur more often than 5 per cent of the time.

**Table 2.1 Trailblazers compared - Impacts on JSA Online take-up**

	Baseline Period	Trailblazer Period	Increase	Increase above Average of non-TB districts
Trailblazer 1	18.7%	31.6%	13.0%	5.8%
Trailblazer 2	23.8%	33.0%	9.2%	2.0%
Trailblazer 3	27.3%	37.6%	10.3%	3.1%
Average of non-Trailblazer districts	21.9%	29.1%	7.2%	N/A

Table 2.1 shows the average JSA Online take-up rate for the baseline and trial periods for each Trailblazer district, and the average figure for districts that were not part of the Trailblazer. In each case the increase in take-up is calculated. The final column presents the difference between the increase in each Trailblazer district and the increase in non-Trailblazer districts. The first two columns are also shown in chart form in Figure 2.1.

**Figure 2.1 Trailblazers compared - Impacts on JSA Online take-up**



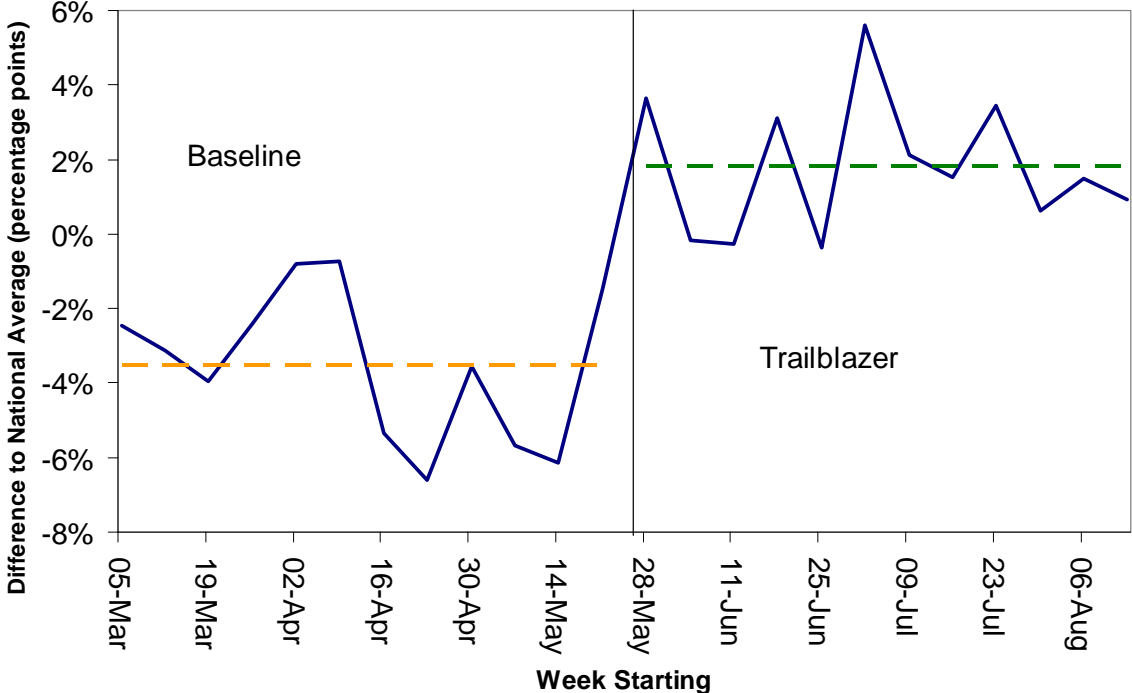
## 2.1 Trailblazer One

The effect of Trailblazer One on the uptake of JSA Online was a positive 5.8 percentage point increase<sup>24</sup> compared to the increase observed in the national average take-up period. This represented a statistically significant increase.

<sup>24</sup> See Annex A for a discussion on the confidence intervals.

Trailblazer One appears to have had an immediate effect on JSA Online uptake. Figure 2.2 shows that in the baseline period the Trailblazer One District averaged over 3 percentage points below average. During the Trailblazer period the District was about 2 percentage points above National Average.

**Figure 2.2 Trailblazer One v National Chart**



**2.1.1 Volumes persuaded online in Trailblazer One**

The goal of Trailblazer One was to persuade eligible callers to claim online and make them aware of available support, such as the DWP JSA Online Helpdesk number and 'third party providers' - external agencies willing to let claimants use their IT equipment and internet access to make a claim. The table below shows the resulting volumes and proportions, as recorded by DWP Contact Centre staff. The outcome categories correspond to those listed in Table 1.2.



**Table 2.2 Call logger results**

Call logger outcome	Description	Number of calls logged	Percentage of all calls	Percentage of callers intending to claim JSA	Percentage of callers intending to claim JSA who are eligible to claim online
1	Online - own access	1,282	10.0%	12.5%	16.6%
2	Online - family/friends access	461	3.6%	4.5%	6.0%
3	Online - 3rd Party Provider access	523	4.1%	5.1%	6.8%
4	Online - own access - handholding support given	39	0.3%	0.4%	0.5%
5	Telephony - no access/skills	3,737	29.3%	36.5%	48.3%
6	Telephony - refuses to claim on line	1,694	13.3%	16.6%	21.9%
7	Telephony - Not eligible to claim online	2,492	19.5%	24.4%	N/A
8	Call not appropriate - redirected	2,548	19.9%	N/A	N/A
<b>Total</b>		<b>12,776</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Calls recorded under outcome code 8 are typically benefit enquiries about existing claims which are then redirected as appropriate. Outcome code 7 shows that there were nearly 2,500 calls from claimants who wished to make a new JSA claim, but were ineligible to claim online. This represents 24.4 per cent of calls intending to claim JSA, (options 1 – 7) or 12.2 per cent<sup>25</sup> of the total claims received in this district during the trial period.

Of those eligible to claim online (represented by outcome codes 1 to 6) 30 per cent were persuaded to make an attempt at claiming online (outcome codes 1 to 4). Of this group, the majority declared themselves able to claim at home (55 per cent), with most of the remainder accessing the internet via friends and family (20 per cent) or third party providers (23 per cent). A small minority (2 per cent) opted to claim online at home, but with 'handholding' support from First Contact agents.

For those choosing to stay with the telephony channel (outcome codes 5 and 6) the most frequently recorded reason was having no access or skills. This group was about twice as numerous as the remaining group who simply refused to claim online.

## 2.1.2 Call Length Impacts

Overall there was no significant impact on average call length. Those claimants who opted to claim by telephone experienced longer calls as they were taken through a longer verbal script to process the claim for JSA. It typically took between two and

<sup>25</sup> This figure of 12.2 per cent is calculated as the number of Option 7 calls divided by the administrative data figure for the total number of JSA claims received in this district this period.

three minutes to establish a claimant's eligibility and willingness to claim online. However these longer calls were counterbalanced by a greater number of shorter calls for those who were persuaded to claim online. A full claim gather can typically take from 15 to 30 minutes depending on the complexity of the claimant's circumstances.

## 2.2 Trailblazer Two

This Trailblazer tested whether extended call waiting times would result in an increase in JSA Online take-up. Initially a five minute additional wait was trialled, but this was increased to ten minutes for the last three<sup>26</sup> weeks of the Trailblazer.

As described in section 1.2, during the IVR claimants received a message about five or ten minute waiting times. On hearing this message 22.9 per cent of callers abandoned their call. However there is no clear way of establishing what these callers did next – some may have claimed online, but others may have instead rung back at a later time.

It is worth noting that in normal operation, outside the Trailblazer districts, claimants can naturally experience a wide spread of waiting times, depending on agent availability when they make their call. For example Mondays tend to be busier than Fridays. Average waiting times are around two minutes, but it is possible for some claimants to wait 20 minutes or upwards during busy periods.

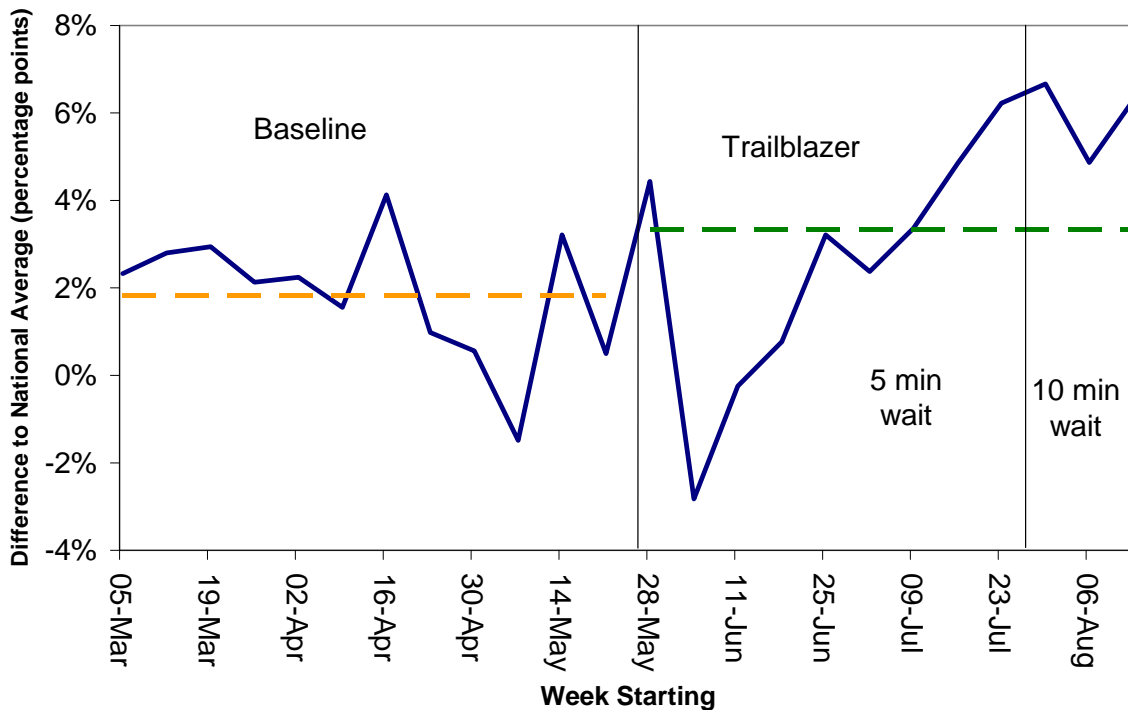
Looking at JSA Online take-up rates, overall Trailblazer Two resulted in a 2.0 percentage point increase in JSA Online take-up compared to the baseline period. However, as explained in Annex A, increases of around two percentage points can occur more than five per cent of the time in the absence of any Trailblazer, so there is some doubt as to the significance of this impact. Moreover a significant result is only obtained by including the data for the period where the waiting time was increased to ten minutes.

The volume of abandoned calls represents around 16 per cent of all JSA claims received during this period. This suggests that only a minority of those who abandon calls went on to claim online.

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<sup>26</sup> The ten minute wait was introduced on 31/07/2013, the second day of week ten.

**Figure 2.3 Trailblazer Two v National Average**



For the first few weeks of the trial, Trailblazer Two appeared to have little or no effect, however this changed during the second half of the trial period. Note that this increase appears to start before the increase in waiting time to ten minutes.

It is also possible to test separately the impact of the different waiting times.

### 2.2.1 Trailblazer Two (five minute wait) v national average

Testing against the five minute wait only, no significant effect was found.

### 2.2.2 Trailblazer Two (ten minute wait) v national average

The effect size of the ten minute wait was 4.7 percentage points compared to the baseline period. This represented a statistically significant difference.

### 2.2.3 Conclusion

Overall this Trailblazer provides evidence that increased waiting time does increase JSA Online take-up, and also shows that the size of the time delay is an important factor.

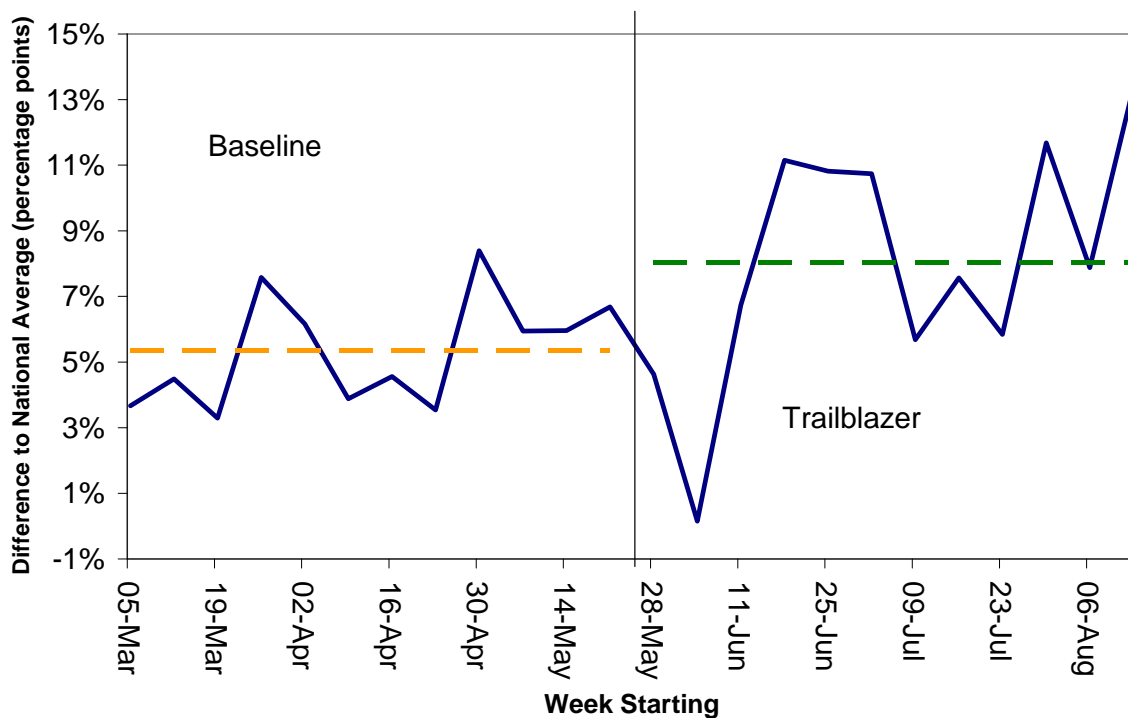
Although there is a significant difference in online take-up between the ten minute wait and the baseline period, take-up started to rise before the rise in waiting time. To be certain that the same impact might be felt from increasing waiting times in future further testing would be needed to determine whether the effect is lagged from the initial increase, or something else has affected the results from this pilot.

In contrast to Trailblazer One this approach does not specifically target those who are able to claim online – the extended waiting times are experienced by all claimants, including those ineligible to claim online.

## 2.3 Trailblazer Three

As with Trailblazer Two the only change to the normal claim process was a change to the messaging in the IVR. On hearing this message about prioritisation of online claims 6.8 per cent of callers abandoned their call. These abandoned calls represent about 5 per cent of claims received in the district during the Trailblazer period. The effect of Trailblazer Three on JSA Online uptake was a 3.1 percentage point uplift compared to the national average. This represented a statistically significant difference, and suggests that a majority of those who abandoned calls did go on to claim online.

**Figure 2.4 Trailblazer Three v National Average**



## 2.4 Longer term Trailblazer impacts

Although longer term impacts of the Trailblazers have not formally been tested, it is likely that they could also lead to higher online uptake in the longer term. This is partly due to their contribution to increasing awareness of JSA Online in the general population, and partly to the fact that many JSA claimants will make further claims in the future. In fact a majority of JSA claimants have had previous JSA claims within the last two years, and administrative data shows that there is a tendency for claimants to choose the same claim channel that they used for their most recent previous claim.

It is also interesting to speculate on the likely results if the Trailblazers had been tested at a different point of time. The increases in Online take-up as a result of the Trailblazer interventions depends on the proportion of claimants who initially attempt a telephone claim – as this is the group who are exposed to the intervention. Therefore if the Trailblazers had been run twelve months previously, when awareness of JSA Online was lower and more claimants attempted telephone claims, it is likely that larger impacts would have been observed. Conversely, as the awareness of JSA Online continues to grow, more claimants will choose the digital channel directly, and the additional impact of the Trailblazer interventions is likely to decrease.

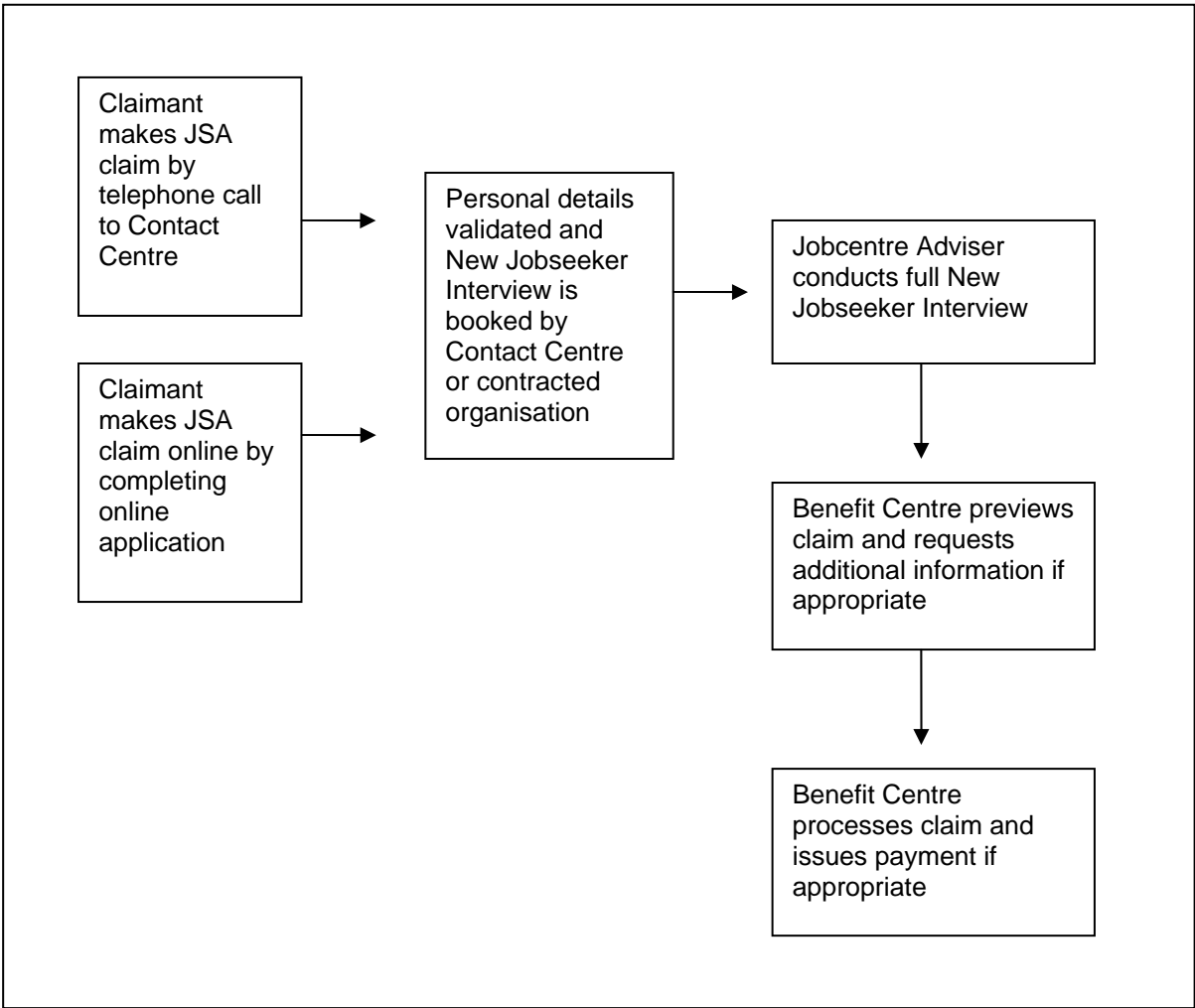
# 3. Operational impacts of the Trailblazers

## Summary

- The Trailblazers caused a number of operational impacts, but this varied by Trailblazer and type of operational site.
- Impacts were felt in the Trailblazer One Contact Centre, where First Contact agents experienced minor changes to their day to day activities because they were using a more flexible script to encourage eligible callers with IT access and/or skills to claim online.
- Calls made to the JSA Online Helpdesk were reported to have increased since the Trailblazers began, and whilst Helpdesk staff felt that they had the resources to take the calls, not all Helpdesk agents felt able to answer all queries.
- Trailblazer Three involved prioritising the processing of online claims and so impacts were particularly felt in the Benefit Centres processing these claims. Extra processing work is created in Benefit Centres when online claim forms are incomplete. Whilst the poorer quality of JSA Online claims is not an impact of the Trailblazers, the resource impact of processing JSA claims may increase if more claims are made online.
- There were low operational impacts in the Contact Centre taking Trailblazer Two and Three calls and in Jobcentres across all Trailblazers. Whilst Jobcentre staff roles had not changed, frontline staff said that they promoted claiming online rather than by telephone. Footfall into Jobcentres was reported by staff not to have changed in the Trailblazer districts.

This chapter presents the operational impacts of the Trailblazers within the three different delivery arms of the business: Contact Centres, Jobcentres and Benefit Centres. This includes an exploration of the impacts of changes to job roles and the impacts upon resources. Figure 3.1 provides a simplified overview of how a JSA claim is made and processed as it progresses through each delivery arm.

**Figure 3.1 Overview of how a telephony or online JSA claim is processed**



### 3.1 Preparation ahead of the Trailblazers

Operational sites were given information to prepare them for the introduction of the Trailblazers. Staff generally had a good understanding of the Trailblazers, and reported receiving clear communications about them, including why they were happening, what they involved and the impacts they would have upon their job roles. Many of the interviewees said that they had received or disseminated information about the Trailblazers during team meetings, as well as via emails. A widespread view amongst interviewees was that communications on the Trailblazers had been informative. A less commonly held view amongst staff was that the Trailblazer communications arrived too close to implementation. Some staff said that they had had the opportunity to become familiar with the JSA Online web pages. In the Trailblazer One Contact Centre, training sessions were provided to First Contact teams to ensure that they were familiar with the new script and desk aides.

## 3.2 Impacts upon Contact Centres

Operational impacts were felt in the Contact Centre taking Trailblazer One calls, but not in the Contact Centre taking Trailblazer Two and Three calls. This was to be expected, given that Trailblazer One involved First Contact Agents actively encouraging callers with IT access and skills to claim online, whereas First Contact Agents taking Trailblazer Two and Three calls had no changes to their script.

### 3.2.1 Trailblazer One

First Contact Agents taking Trailblazer One calls reported some changes to their day to day activities, because they were using a more flexible script for Trailblazer calls that demanded the agent to encourage eligible callers to claim online, influencing and handling objections rather than undertaking an information gathering exercise. They tried to persuade eligible callers to claim online, using a series of diagnostic questions to determine whether they had internet access and skills. This was felt to be a manageable and minor change for staff and they felt confident with this role. Agents generally felt able, using the questions contained in the script, to identify callers who would be able to undertake their claim online, and others who would need to claim by telephone. The telephony option to claim JSA was available to claimants who did not wish to use the online channel. Staff said that many callers who agreed to claim online were happy to leave the call to pursue an online claim, whilst others required more persuasion. Staff provided examples of how they tried to persuade Trailblazer One callers to claim online, as enabled by the greater scope of the more flexible script, which included:

- Going beyond the suggested wording in the script in order to encourage people to claim online. It was reported that some agents were able to reinforce the message of claiming online *throughout* the call, as they built up a rapport with the claimant. It was acknowledged that this aspect of the job role requires effective influencing and persuasion skills, and that it is “*a little bit like selling.*”
- Emphasising the advantages of claiming online, such as being able to save it and complete it in several chunks.
- Giving ‘handholding’ support to callers who said they find the Directgov website confusing, by remaining on the phone as they accessed the website and talking them through how to get to the first screen of the claim form.
- Letting callers know that if they had any problems with claiming online that they could ring the Helpdesk telephone number.
- For those who did not have internet access, informing them of where they could go to use a computer with access to the internet, by consulting a spreadsheet list of third party providers which was kept up to date by the Contact Centre.
- Informing callers that Universal Credit is coming in soon and that they will have to claim online then.

The *average* length of Trailblazer One First Contact calls was reported by staff to be slightly longer than for national First Contact JSA claim calls, largely as a result of the additional lines in the script. However, some staff said that calls which had resulted in encouraging the caller to claim online were slightly shorter than average, because a caller’s decision to leave the call and claim online usually happened early on in the



process. This is consistent with the findings of the quantitative analysis reported in section 2.1. The slightly longer perceived average length of Trailblazer calls was felt to be manageable as Agents working solely on Trailblazer calls often experienced a wait time between calls as they waited for the next Trailblazer call to come through, indicating that Trailblazer One callers were able to get straight through to an Agent.

Agents said that they sometimes took repeat calls from claimants who left their initial call and then failed in their attempt to claim online, and so re-contacted the Contact Centre again to make their claim by telephone. Interviews with non-digital channel claimants who tried but were unable to complete their claim online explored reasons for ultimately claiming via a non-digital route. Reasons included having experienced a technical problem or having encountered a problem with the JSA Online claim form. (See section 5.3 for more details). There were also reported instances of JSA Online Helpdesk staff redirecting Helpdesk callers to the First Contact claims line if they had been unable to complete the form as intended.

*'There [are] some circumstances where the system just doesn't do what they want it to do so then we would advise them to use the telephone line.'*  
(Contact Centre staff member, Trailblazer One)

Another group of Contact Centre staff impacted by the Trailblazers was staff working on the JSA Online Helpdesk to answer queries from people trying to complete their JSA Online claim form. A mixture of staff were taking calls on the Helpdesk, including First Contact Agents and staff working on other DWP Helpdesks. JSA Online Helpdesk queries are not the only types of calls they handle.

Some staff working on the Helpdesk (although not all) noticed an increase in the number of JSA Online queries made to the Helpdesk since the Trailblazers began. One Agent said that they had taken a handful of JSA Online queries in the previous six months, but that they were now taking 2-3 JSA Online queries a day. The Helpdesk telephone number is often given out by First Contact agents taking Trailblazer One calls, but it is a service available to all JSA Online claimants. Therefore the increase in calls may be due to all of the Trailblazers *and* other work being undertaken by DWP to promote JSA Online. Staff felt that resources were able to cope with the additional calls to the Helpdesk during the trial period.

Staff said that the average call length for Helpdesk calls had not changed since the Trailblazer began, because it tended to be the same types of queries that were coming through. These queries included not knowing the type of information that was required in certain fields of the online claim form.

It became apparent that how effectively staff working on the JSA Online Helpdesk were able to deal with queries depended on their knowledge and experience of benefits and how to claim. Whilst some had previously received benefits training and had a good awareness of the JSA claim form, others had not and so did not feel as able to take the calls. As one staff member said,

*'It might make it harder if you don't have a [First Contact] background and you can't find the information.'*  
(Contact Centre staff member, Trailblazer One)

It was also reported that Helpdesk staff might benefit from better reference tools (such as larger screen shots or the ability to view a person's live claim) and further training in relation to JSA Online in order to help them answer queries effectively.

### **3.2.2 Trailblazers Two and Three**

First Contact agents taking Trailblazer Two and Three calls did not see any changes to their job roles and said that *'day to day work is very similar to before'* (Contact Centre staff member, Trailblazer Two and Three). Agents said that they were informing callers that they could claim online at the beginning of the call, because this had become part of the mandatory text for all JSA First Contact calls, regardless of being in a Trailblazer area.

Agents taking Trailblazer Two and Three calls also said that they had not noticed any change in the number of calls that they received. However, the nature of call routing means that individual agents are not in a position to judge overall call volumes.

It was felt that the impact of Trailblazers Two and Three upon Contact Centre resources was manageable, with it being *'more or less business as usual.'*

*'Resource wise ... other than a bit of implementation to support the pilot ... it has been very normal.'*

(Contact Centre staff member, Trailblazer Two and Three)

## **3.3 Impacts upon Jobcentres**

There was a minimal impact upon the job roles of staff working in Jobcentres within the Trailblazer districts. Staff were made aware of the Trailblazers taking place and front of house staff said that they promoted claiming online rather than by telephone to potential JSA claimants, although this is not necessarily a consequence of the Trailblazer.

*'Most customers will come into the Jobcentre and say that they want to make a new claim for JSA and then we talk them through the Directgov website and how to claim online.'*

(Jobcentre staff member, Trailblazer One)

*'We now tell them how to claim online – we give them the website address.'*

(Jobcentre staff member, Trailblazer Two)

Staff working in Jobcentres within the Trailblazer districts said that there had been no increase or decrease in the amount of customer footfall in the Jobcentre. Some said there had been no change in the number of queries about claiming online from Jobcentre visitors, but others said that they had received comments from claimants who had attempted to claim online and had a negative experience.

## 3.4 Impacts upon Benefit Centres

The Benefit Centres managed the resource implications of prioritising online claims in Trailblazer Three by allocating staff from within the JSA New Claims teams to specifically focus on processing online claims. Job roles did not really change (i.e. processing staff continued to process JSA claims). However, staff processing the online Trailblazer claims were no longer able to prioritise Rapid Reclaims or 'urgent' claims, and so these were dealt with by other processing staff. Staff felt that online claims were effectively marked up as such by the Jobcentres, meaning that it was straightforward for Benefit Centre staff to recognise which claims needed to be prioritised.

Staff said that a considerable proportion of the JSA claims made online were incomplete. For example, some questions had been left unanswered, such as savings, employment details and whether the claimant was male or female. It was also reported that Jobcentre staff were not gathering the missing information at the initial New Jobseeker's Interview (NJI) stage. As a result, staff processing the online Trailblazer claims had to spend time re-contacting claimants for further information in order to process their claim, meaning that they processed fewer claims per day. Staff did report that when an online claim is complete and contains all of the necessary information, it is processed as soon as it is received in the office.

*'If Trailblazer claims came through and they were up and ready and we could just process them and pay the customer, then we would, and we do with ones that don't need any further information on; they are processed as soon as they are received in the office. But obviously if then, if we've got to write to the customer to contact them, we've got to wait for the information we require before we can process the claim.'*

(Benefit Centre staff member, Trailblazer Three)

*'It doesn't seem that the Jobcentres are getting all the information before they're sending them across. So, obviously, that's delaying the claim when they come here.'*

(Benefit Centre staff member, Trailblazer Three)

It was reported that the extra work involved in re-contacting the claimants for further information added to the claim processing time (although the claim start date was not affected). This made it difficult to achieve their internal target to process 90 per cent of JSA claims within 16 days, and some Benefit Centre staff mentioned that they tended to receive online claims when they were already six to nine days old.

The poorer quality of JSA claims made online is not necessarily an impact of or linked to the Trailblazers, given that it is an issue associated with JSA Online claims generally and not just online claims in the Trailblazer districts.<sup>27</sup> However staff felt the resource impact of processing JSA claims may increase if more claims are made

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<sup>27</sup> Since the interviews were undertaken, a number of changes have been made to the JSA Online claim form, in order to improve the experience for claimants, make the online application quicker and easier to complete and ensure that the claim forms contain more complete and accurate information to help them be processed more quickly.

online. It was felt that if the proportion of online claims increased to 80 per cent, then it might not be feasible for Benefit Centres to be able to prioritise them. It was also suggested that more staff would need to be allocated to processing online claims if the volume of online claims increased.

## 4. Impacts upon staff understanding and attitudes to claiming online

### Summary

- Staff across the Trailblazer districts demonstrated awareness of the DWP digital agenda, being broadly aware of the target for 80 per cent of JSA claims to be made online by September 2013. Some were able to view this within the wider policy context around the future introduction of Universal Credit.
- A widespread view amongst staff was that providing the opportunity to claim online is positive, offering the claimant several advantages including better convenience and greater channel choice. Some were concerned that certain groups of claimants would not be able to claim online, and felt that how a claim is made should be up to the individual.
- It was acknowledged that staff need to have a positive attitude towards claiming online and the right digital knowledge and skills to enable them to be confident in encouraging claimants to go online.

This chapter reports findings on the impacts of the Trailblazers upon staff understanding of the DWP Digital Agenda and their attitudes to claiming online. This was explored because it is known from other research that frontline staff play a key role in promoting the use of other channels amongst claimants.<sup>28</sup>

### 4.1 Understanding of the DWP Digital Agenda

Generally, staff across the Trailblazer Districts demonstrated awareness of the DWP digital agenda, being broadly aware of the target for 80 per cent of JSA claims to be made online by September 2013. Some were able to view this target within the wider policy context around the future introduction of Universal Credit. Some staff felt that their knowledge of the digital agenda was due to the introduction of the Trailblazers and the associated communications around them. Others, including Jobcentre Digital Champions, said that their knowledge of the digital agenda existed before the increased communications around the Trailblazers.

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<sup>28</sup> Adam, D. et al. (2011) *Increasing digital channel use among digitally excluded Jobcentre Plus claimants* DWP Research Report No 776 <http://research.dwp.gov.uk/asd/asd5/rports2011-2012/rrep776.pdf> p.43

## 4.2 Attitudes towards encouraging claimants to claim online

Staff were asked for their views on promoting claiming online. A range of views was put forward and is summarised below.

- **Online is the future**

A widespread view amongst staff was that providing claimants with the opportunity to claim online is positive, and there was recognition that transacting online is becoming more commonplace in our daily lives.

*'I think online is the future – everything seems to be online now. Car insurance, banking and everything so it makes sense really.'*  
(Jobcentre staff member, Trailblazer One)

*'Encouraging claimants to claim online is the way we should be going ... online is the way we do our business today.'*  
(Contact Centre staff member, Trailblazer Two and Three)

*'I think that it's a good idea that you can do everything online – you can do everything online now, I think it's probably the way to go.'*  
(Benefit Centre staff member, Trailblazer Three)

- **Advantages for claimants**

Some staff felt that being able to claim online offers advantages to many claimants, including better convenience, improved customer service and greater channel choice. Several interviewees said that they are happy to be advocates of online service delivery.

*'It's convenient and saves time and money. I'm an advocate of using it. That's what I'm trying to get across to Digital Champions and staff, and to get across the notion that having online means that there is so [much] more choice for customers. Where previously we only had the phone for claims, it increases options...'*  
(Jobcentre staff member, Trailblazer Three)

*'I think it's a good idea to give them the option so they don't have to be hanging on the phone for 30 minutes and the option that they can go back to it.'*  
(Contact Centre staff member, Trailblazer One)

Another viewpoint expressed was that JSA Online gives claimants a greater sense of personal responsibility for their claim, enabling them to “see it through themselves” and to check up on the progress of their claim, rather than enquire in person at a Jobcentre or by telephone to a Contact Centre. Some staff felt that developing digital

skills through claiming online can help some claimants to be more ready to enter the job market.

*'If 70 per cent of employers recruit online then the customer needs to be aware of IT [Information Technology].'*  
(Jobcentre staff member, Trailblazer Three)

Staff also felt that an increase in the proportion of online claims would free up some staff time to be able to focus on helping the claimants who most need support. This echoes a finding from previous research that staff considered the provision of online services had the potential to enable advisers to give more time to supporting those in need.<sup>29</sup> It is also supported by the DWP Digital Strategy which states that increasing the take up of digital services can reduce how much it costs to serve customers and claimants, freeing up time for staff to give more intensive support to those who need it.<sup>30</sup>

Some staff stated that enabling people to claim online is a good idea, provided that the process works. This links to comments made by other interviewees regarding the poorer quality of online claims and some claimants experiencing problems with the online claim form (see sections 3.3 and 6.3).

*'If people didn't make as many mistakes as they do or if the form worked properly then it would be a really good thing [to claim online].'*  
(Contact Centre staff member, Trailblazer Two and Three)

## • Importance of channel choice

Staff generally felt that it should be up to the individual how they choose to claim, whether online, by telephone or face to face. This viewpoint is echoed by claimants in section 5.4. Some felt that a better level of customer service could be provided to claimants over the telephone.

*'There shouldn't be any pressure to claim it one way or the other. Personally if it was me doing it I think I would rather do it over the telephone. I think you get a far better service and a more intimate service over the telephone than you do by using online.'*  
(Contact Centre staff member, Trailblazer One)

Staff across all Trailblazers felt that it is important for the telephony channel to be available to certain claimants who are not able to claim online. Some Trailblazer One Jobcentre and JSA Online Helpdesk staff suggested that they had directed claimants to the telephony channel, including those who did not have internet access and those who had tried to claim online but experienced difficulties.

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<sup>29</sup> Adam, D. et al. (2011) *Increasing digital channel use among digitally excluded Jobcentre Plus claimants* DWP Research Report No 776 <http://research.dwp.gov.uk/asd/asd5/rports2011-2012/rrep776.pdf> p.15

<sup>30</sup> DWP Digital Strategy (December 2012) [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/139489/dwp-digital-strategy.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/139489/dwp-digital-strategy.pdf) (DWP) p.12

Some staff were worried that certain groups of claimants would not have the capability to claim online, such as claimants who do not speak English, those who are not computer literate, and those who require appointees.<sup>31</sup> Whilst some staff felt that older claimants would generally be less likely to claim online,<sup>32</sup> it became apparent from Contact Centre staff that age is not always a good indicator as to whether a caller will agree to claim online.

*'A lot of young people won't do it and some older won't do it, even if they have got the access, because they haven't got the skills.'*  
(Contact Centre staff member, Trailblazer One)

*'[I]t can surprise you where some you think they're not going to actually say they will [claim online]. I had a 60 year old woman and I was getting ready to take the claim when she said, 'oh yeah, I'll do that online,' and then you get 19-20 year olds who just won't do it. No matter what you say they can't be bothered to do it online, they want you to do it for them.'*  
(Contact Centre staff member, Trailblazer One)

There was also a concern that requiring callers to be on hold for a longer period of time could be problematic because the number might cost money. However this perception is largely incorrect as calls to the 0800 JSA claim line are free from BT landlines and most mobiles.<sup>33</sup>

Some Contact Centre staff taking Trailblazer Two and Three calls were concerned about the future of Contact Centres in the context of encouraging claimants online.

*'It is a bit worrying, if everyone goes online to claim, what happens to telephony?'*  
(Contact Centre staff member, Trailblazer Two and Three)

However despite these concerns, they recognised that the option of an online channel provides good customer service.

## • Staff skills and confidence are important

It was also acknowledged that staff need to have a positive attitude towards claiming online and the right digital knowledge and skills to enable them to be confident in encouraging claimants to go online. This supports previous research which found that frontline staff play 'a crucial role in creating awareness and encouraging the use of online channels among claimants.'<sup>34</sup>

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<sup>31</sup> In fact those claiming via appointees are one of the groups not eligible to complete online JSA claims, and so instead have to claim by telephone or face-to-face channels.

<sup>32</sup> ONS data shows that the proportion of the population that has ever used the internet decreases as age increases - see [http://www.ons.gov.uk/ons/dcp171778\\_286665.pdf](http://www.ons.gov.uk/ons/dcp171778_286665.pdf)

<sup>33</sup> DWP (May 2012) *Jobseeker's Allowance; Help while you look for work* Leaflet DWP019 [http://www.direct.gov.uk/prod\\_consum\\_dg/groups/dg\\_digitalassets/@dg/@en/@benefits/documents/digitalasset/dg\\_199994.pdf](http://www.direct.gov.uk/prod_consum_dg/groups/dg_digitalassets/@dg/@en/@benefits/documents/digitalasset/dg_199994.pdf)

<sup>34</sup> Adam, D. et al. (2011) *Increasing digital channel use among digitally excluded Jobcentre Plus claimants* DWP Research Report No 776 <http://research.dwp.gov.uk/asd/asd5/rports2011-2012/rrep776.pdf> p.43



*'I think you need to be positive about it really. If you go in with a negative attitude people are going to think that it's not going to work; they're not going to use it. Sometimes you may not be wholeheartedly sure about something ... but you have to give a positive mental attitude shall we say, and that comes across to people – if you're positive about something they're gonna embrace it.'*

(Jobcentre staff member, Trailblazer Two)

*'We've actually now got a Digital Champion on site who is delivering training sessions to make sure that staff can actually do what we are asking the customers to do... so that staff, you know, if a customer says 'but I don't know how to do that', that we can actually talk them through it.'*

(Jobcentre staff member, Trailblazer Two)

# 5. Claimant reactions to being directed online

## Summary

- Reasons for making a claim online or by a non-digital channel varied by claimant group. *Independent online claimants* claimed online because they felt it was easier and more convenient, whilst *nudged online claimants* had been persuaded to claim online by staff.
- Claimants who claimed by non-digital channels did so because they had experienced a problem claiming online, or because they preferred human contact, did not have access to the internet or did not have the skills to claim online.
- Some claimants did not mind being asked to claim online, whilst others felt disappointed. People felt there should be a choice in how to claim.
- Staff said that there had been no formal written complaints from claimants as a result of the Trailblazers.
- There were a few reported instances of verbal complaints in Jobcentres in Trailblazer One from claimants reporting that they had experienced problems with the online claim form or who felt they were not able to claim online.

## 5.1 JSA Claimant interviewee classification used in this study

Due to the sampling approach and who it was possible to interview during the fieldwork (see Annex A), JSA claimant interviewees included:

### A. Online claimants

1. **Independent online claimants** – Online claimants who claimed online independently of the Trailblazers. (All of these claimants were from Trailblazers Two and Three.)
2. **Nudged online claimants** – Online claimants who initially rang the First Contact JSA telephone claims line, but then claimed online. These claimants were successfully persuaded to claim online by the Trailblazer. (All of these claimants were from Trailblazer One.)

## B. Non-digital channel claimants

3. **Non-digital channel claimants who tried to claim online** – Claimants who made their claim by a non-digital channel (e.g. by telephone or face to face in a Jobcentre) who had previously tried to claim online but did not go through with it. (This category included claimants from all three Trailblazers.)
4. **Non-digital channel claimants who did not try to claim online** – non-digital channel claimants who had not tried to claim online. (This category included claimants from all three Trailblazers.)

Throughout chapters 5 and 6, differences in views between online and non-digital channel claimants are shown. Where possible, if views differ *within* these categories between subgroups of claimants (e.g. between *independent online* and *nudged online* claimants) this is reported, and for ease of reference subgroups are *italicised*. However as outlined in section 1.5.2, it is not possible or appropriate to make any statistical statements on the prevalence of a specific view within the population in scope.

## 5.2 Internet use and attitudes amongst claimant interviewees

Online *and* non-digital channel claimants (including claimants from all four subgroups) said that they access the internet very regularly, with many stating that they use it on a daily basis. Claimants generally tend to use the internet at home, and some stated that they also access the web using their mobile phone or smart phone. Others said that they do not have internet access in the home, and that they tend to access it elsewhere, either at a library or through a friend's connection. Interestingly, claimants who felt they did not have the skills to claim online said that they used the internet to access information and social networking sites. There were no obvious differences in internet use between the online and non-digital channel claimants that were interviewed in this study.

Some online claimants felt that going online is now a social norm, having become part of everyday life, and so as a result they felt comfortable with using the internet. As one claimant said,

*'I suppose that everything is online these days so really it's part and parcel of going forwards.'*

(Nudged online claimant, Trailblazer One)

Non-digital channel claimants were asked if they had ever made any other Government transactions online. Some claimants stated that they had undertaken online transactions including paying for car tax, TV licensing and passport applications. Common reasons for making these transactions online included speed and the convenience of not having to visit the Post Office. Others said that they did not make any government transactions online. The interviews showed no obvious differences in the propensity to undertake other government transactions online between non-digital channel claimants who tried to claim JSA online and those who did not try to claim JSA online.

# 5.3 Reasons for claiming online or by a non-digital channel

Claimants were asked why they had decided to make their most recent JSA claim online or by a non-digital channel. Reasons varied by claimant subgroup, summarised by Table 5.1. Due to the qualitative nature of this study, it is not possible to estimate the proportion of claimants likely to fit into each group.

**Table 5.1 Reasons for making a claim online or by a non-digital channel**

<p><b>Independent online claimants</b></p> <ul style="list-style-type: none"> <li>Easier to claim online</li> </ul>	<p><b>Nudged online claimants</b></p> <ul style="list-style-type: none"> <li>Persuaded to claim online by staff at Contact Centre or Jobcentre</li> </ul>
<p><b>Non-digital channel claimants who tried to claim online</b></p> <ul style="list-style-type: none"> <li>Experienced a technical problem</li> <li>Encountered a problem with the JSA Online Claim Form</li> </ul>	<p><b>Non-digital channel claimants who did not try to claim online</b></p> <ul style="list-style-type: none"> <li>Preference for human contact</li> <li>No access to Internet</li> <li>No skills to claim online</li> </ul>

## 5.3.1 Reasons for claiming online

Amongst *independent online claimants*, a widespread reason for claiming online was that it is easier and more convenient to claim online.

*‘It was just instinctive to look for it online and apply in that way.’*  
 (Independent online claimant, Trailblazer Three)

*‘Online is easier than on the phone, I’m guessing.’*  
 (Independent online claimant, Trailblazer Two)

*‘There is no queuing, it’s more convenient and when you need to go and look something up you can do.’*  
 (Independent online claimant, Trailblazer Three)

Other, less prevalent, reasons for claiming online included being more able to fit it in around caring for their children, a perception that it would be cheaper to claim online, a dislike of the telephone and a preference for it to be in writing to help avoid misinterpretation.

*Nudged online claimants* had been persuaded to claim online by staff.

*‘I tried to phone up first, you know like how you used to, and they said you had to do it online.’*  
 (Nudged online claimant, Trailblazer One)

### 5.3.2 Reasons for claiming by a non-digital channel

*Non-digital channel claimants who tried to claim online but did not go through with it, said that they ultimately made their claim via a non-digital route either because they had experienced a technical problem (for example, one person said that the system crashed and another said that their internet connection failed), or because they had encountered a problem with the JSA Online claim form (for example, one person said they did not understand the question wording, and another said that they made an error on the form and so needed to speak to someone to resolve it).*

Amongst *non-digital channel claimants who did not try to claim online*, a common reason for claiming by telephone or in person was a preference for human contact. Claimants valued the importance of speaking to someone to gain reassurance that their claim was being dealt with, to be able to discuss a complex claim, and/or to be able to talk to someone at a difficult time of being unemployed. Other reasons for claiming by telephone included a perception that it is easier and quicker to claim online.

*'When you're making a claim you're distressed, you want someone to comfort you.'*

(Non-digital channel claimant, Trailblazer Three)

*'I think it's more personal and it's easier for me to get all my questions out and things like that.'*

(Non-digital channel claimant, Trailblazer Two)

Other reasons for not attempting to claim online included having no access to the internet and not having the skills to claim online.

*'Normally I'd prefer to make the claim online but I didn't have the internet so didn't have a choice.'*

(Non-digital channel claimant, Trailblazer Three)

*'I'm not very good at doing things like that at all. I would have been totally stuck. I couldn't have done that.'*

(Non-digital channel claimant, Trailblazer One)

*'I don't have computer skills so I knew that was going to be a problem for me right from the outset and I am 54 years old so I don't have computer experience so straight away that is going to cause a problem.'*

(Non-digital channel claimant, Trailblazer One)

### 5.3.3 Perceived advantages of claiming online

Claimants were asked to consider any advantages of claiming online. These were identified by both online and non-digital channel claimants.

A particularly widespread perceived advantage was that making an online claim can be undertaken at any time of the day, thus being flexible and allowing it to fit in

around one's lifestyle. An online claim can be made at any time whereas making a telephony claim is restricted to the opening hours of the Contact Centre.

*'You can claim at any time of day. You don't have to wait for opening times and things like that.'*

(Independent online claimant, Trailblazer Two)

*'You can do it any time; you can do it in the middle of the night if that's the only time you've got free.'*

(Non-digital channel claimant, Trailblazer Two)

Other identified advantages of claiming online included being able to assemble the information required in advance of completing the form, being able to complete it in segments, and being able to take one's time and review the answers before submitting.

Some claimants identified the relative advantages of claiming online over claiming by non-digital channels. These included no call waiting times, not having to spell out words over the telephone, and not having to visit the Jobcentre. Finally, it was reported that online claiming reduces the number of people ringing up the claim line, which means that those people who need to speak to someone about their claim are more able to get through by telephone.

### **5.3.4 Views of claiming by telephone**

Non-digital channel claimants were asked for their views in relation to claiming by telephone. A widespread theme was that they welcomed claiming by telephone because they valued being able to talk to someone during the claim process. They found it reassuring to be able to ask questions and know that it had been processed properly. Some praised First Contact staff for being friendly and sensitive during the call, and some felt pleased that the call had been quick.

Other non-digital channel claimants felt that claiming by telephone had been time consuming, and some Rapid Reclaim claimants in particular felt that it had taken a long time to make their Reclaim by telephone.

*'For something that was meant to be a Rapid Reclaim it was long and drawn out. The phone call felt a lot longer than it should have been.'*

(Non-digital channel claimant, Trailblazer Three)

Some online claimants also identified advantages of claiming by telephone. They felt it is important for the telephony channel to be available to some groups of claimants who they felt might not have access to the internet, understand the questions in the claim form or have the skills to claim online.

## 5.4 Views of being encouraged to claim online

### 5.4.1 Being directed online

Non-digital channel claimants and *nudged online claimants* were asked how they felt when they were asked by staff to claim online. In all three Trailblazers, claimants who rang up the Contact Centre were informed that they could claim online as part of the standard script. In Trailblazer One specifically, Agents were more actively encouraging claimants to go online and provided information about internet access in their own locality.

Some *nudged online claimants* said that they were fine about being asked, inferring that transacting online has become part of everyday life.

*'I suppose everything is online these days so really it's part and parcel of going forwards.'*

(Nudged online claimant, Trailblazer One)

Other *nudged online claimants* said that they would have preferred to claim by telephone, especially as they were already on the phone, but nevertheless agreed to claim online when asked to do so because they considered themselves "*fine with computers.*"

Views on being asked to claim online amongst non-digital channel claimants were mixed. Amongst *non-digital channel claimants who did not try to claim online*, some did not mind being asked to claim online as they expected to hear that sort of message these days, and some said they would have done so if they had internet access.

*Non-digital channel claimants who did not try to claim online* were not necessarily against the principle of claiming online. Some said that they would claim online, either if they could be assured that it was secure, if they had internet access, or if there was no alternative. Others felt that they would prefer to claim by telephone rather than online because they felt that they did not have the confidence or skills. They tended to resist attempts to be persuaded online, feeling adamant that they wanted to claim by a non-digital channel.

*'[T]hey tried to, tried to push me [to claim on-line]. But I just thought no, I'll do it. I rang Jobseeker's Allowance and said I would rather go into the office. Which he understood that, he said fair do's, that's entirely up to you.'*

(Non-digital channel claimant, Trailblazer One)

*Non-digital channel claimants who had tried to claim online* generally felt that they would have preferred to claim online as it was convenient and avoided a potential wait time in a queue to get through to a Call Agent on the telephone.

Some non-digital channel claimants (including those who tried to make an online claim and those who had not tried) were disappointed to have been asked to claim online. They said that not everybody has the capability or the access to make their

claim online, and there was a feeling that they were being “fobbed off” by being asked to claim online.

*‘It feels like they are passing the buck by telling us to go online.’*  
(Non-digital channel claimant, Trailblazer One)

*‘... the first port of call is normally the phone, and you feel a bit fobbed off making a call and then being asked to go elsewhere, especially if you’ve already been waiting ages on the phone.’*  
(Non-digital channel claimant, Trailblazer Three)

A view expressed by online and non-digital channel claimants was that people should have a choice as to whether or not to claim online (a view shared by staff in section 4.2), and there was an acknowledgment that not everyone would have the skills to claim online.

*‘I am used to using the Internet but not everyone is. People will automatically do what they feel most comfortable with. If they don’t have the internet or don’t know how to use it then they would rather just telephone and speak to a person.’*  
(Independent online claimant, Trailblazer Two)

*‘I think online is better, but it’s good to have the choice.’*  
(Non-digital channel claimant, Trailblazer Three)

*‘They always say well there’s a library if you haven’t got a computer, well it’s like not everyone can use a computer, you know what I mean?’*  
(Non-digital channel claimant, Trailblazer One)

This supports previous research which found that whilst claimants thought demand for non-digital channels would naturally decrease as services move online, they felt that telephony and face to face support should remain for people with particular circumstances, such as those with complex queries or those who lack confidence in using online services.<sup>35</sup>

## **5.4.2 Staff views of claimant reactions to being asked to claim online**

Claimant reactions to being asked to claim online were also reflected in the staff interviews. Contact Centre staff said that some callers had been willing to claim online when asked to do so. They said some claimants were surprised and pleased to be able to claim online, and others were willing to give it a try knowing that Helpdesk support would be available.

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<sup>35</sup> Adam, D. et al. (2011) *Increasing digital channel use among digitally excluded Jobcentre Plus claimants* DWP Research Report No 776 <http://research.dwp.gov.uk/asd/asd5/rports2011-2012/rrep776.pdf> p.28



*'[T]here have been a few saying, 'I didn't realise I could do it online, oh brilliant.'*

(Contact Centre staff member, Trailblazer One)

*'I have had some customers who are happy to claim online but have asked for a number they can phone "just in case" things go wrong – so almost like a safety net.'*

(Jobcentre staff member, Trailblazer One)

Staff also reported that some callers were unwilling to claim online. In Trailblazer One, where Contact Centre staff actively promote online claiming, First Contact agents said that the majority of claimants remained on the phone rather than leaving the call to claim online. This is consistent with the quantitative findings, which showed 70 per cent of eligible claimants chose to stay with the telephony channel (see section 2.1.1).<sup>36</sup>

A commonly held viewpoint amongst Contact Centre staff across all Trailblazers was that some claimants can be reluctant to leave the phone call in order to claim online if they have been waiting for a period of time in order to get through to an Agent. This may be particularly associated with Rapid Reclaims which usually take a shorter amount of time to complete.

*'If they've been on the phone for a while, when they eventually get through they want to stay on.'*

(Contact Centre staff member, Trailblazer One)

*'[I]f they've waited five, ten, 15 minutes to get through to us, they know a Rapid Reclaim over the telephone is going to take a good agent about eight minutes. And they are just going to stick with that eight minutes. They are not going to go away and do it online. Especially if they've waited ten, 15, 20 minutes. Those that are familiar with the process know that it's a ten minute job to do a Rapid Reclaim over the telephone.'*

(Contact Centre staff member, Trailblazer One)

Staff said other reasons for being unwilling to claim online included a lack of internet access and/or IT skills and simply being used to claiming by telephone.

*'There is very much a feeling of inertia in that 'this is how I have always done it.''*

(Jobcentre staff member, Trailblazer One)

*'...[A] lot of people have got used to doing it over the phone so they know how easy it is, especially Rapid Reclaims'*

(Contact Centre staff member, Trailblazer One)

Some staff reported that some callers simply preferred to claim by telephone as they wanted the reassurance of speaking to a person to ensure it is done accurately.

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<sup>36</sup> In section 2.1.1 it is reported that 30% of eligible claimants were persuaded to try to claim online, therefore 70% remained with the telephone channel.

*'For people who have not claimed before, claiming any benefit is such a big, important and scary thing that they want to talk to someone to ensure it is done correctly.'*

(Contact Centre staff member, Trailblazer Two and Three)

*'Some customers are reluctant to go online and always want to speak to someone.'*

(Jobcentre staff member, Trailblazer Three)

This is backed up by the claimant findings reported in section 5.3 which found that one of the reasons for wanting to claim by telephone was the reassurance of human contact.

### **5.4.3 Reactions to recorded IVR messaging in Trailblazers Two and Three**

Staff taking Trailblazer Two and Three calls were asked whether there had been any reaction from callers to the IVR messaging that they were either in a five minute queue on the telephone or that online claims are prioritised over claims made by telephone. Staff reported instances of Trailblazer Two callers being impatient about the wait time and having to listen to the 'on hold' music. Others said that callers have been prepared to wait and that there had been no change in customer behaviour or attitudes. Of those staff interviewed, no one reported callers having commented about online claims being prioritised over telephone claims.

Trailblazer Two telephony claimants were asked if they remembered hearing a recorded message informing them of a wait time, when they rang the JSA claim line. Generally, claimants said that they did not remember hearing the message. However, when asked if they remembered being asked to claim online, all Trailblazer Two telephony claimants said yes. When asked whether a longer wait time on the phone would encourage them to claim online, some said that they would prefer to go online rather than wait in a queue. For example, when referring to the wait time on the telephone, one claimant stated,

*'the whole process is so annoying, like the music, the repetition of the speech and the music, the most annoying one I've found. I would definitely go online.'*

(Non-digital channel claimant, Trailblazer Two)

Others were more determined that they would remain on the phone if they had to wait. One person felt that the length of time someone would be willing to remain on the phone would be dependent on a person's circumstances and whether "*things were desperate*" (Non-digital channel claimant, Trailblazer Two).

Trailblazer Three telephony claimants were asked if they remembered hearing a recorded message informing them of online claims being processed as a priority over telephone claims, when they rang the JSA claim line. Some could remember hearing the message whilst others could not recall it. Some were also able to recall being

asked to claim online at the Direct.gov website.<sup>37</sup> When asked how they felt about online claims being prioritised over telephony claims, views were varied. These included an opinion that it was a good way to encourage more people to claim online, an impression that it did not matter as long as all claims were processed in the end, and a feeling that it did not seem very fair and that all claims should be processed in the same time period regardless of how they are made.

## 5.5 Impact of the Trailblazers on formal complaints

Some staff in Trailblazers Two and Three said that they had expected to receive some complaints, but in reality the widespread view was that they had not received any formal written complaints as a result of the Trailblazer.

In Trailblazer One, Contact Centre staff reported that no one had made a formal written complaint<sup>38</sup> in relation to the Trailblazer. There were a few reported instances of a claimant making a verbal complaint to staff in some Jobcentres within Trailblazer One, and these were reported to have been resolved without needing further escalation. These verbal complaints included claimants reporting that they had experienced problems with the online claim form (although this is not a direct impact of the Trailblazer), and others who felt they were not able to claim online but were given no other option by the Contact Centre.

In Trailblazer One, Contact Centre staff said that callers tended to be polite on the phone but that there had been occasional instances of callers being disgruntled about being asked to claim online.

*'Initially the agents were reporting that they were receiving a lot more attitude from customers – especially if people had rung back a couple of times, then they are pre-empting the scripts with, 'no I don't want to claim online.'*  
(Contact Centre staff member, Trailblazer One)

*'We've all now spoken to customers who have said, you know you tell them did you know the Department's preferred method, and they interrupt very early on in the call, they interrupt with, 'I can't do it online, I want you to take the phone call'. They have become familiar with the process – they know what we are about to say and they cut through all of it by telling us very early on, and often quite aggressively, that they want to do it on the telephone, with me, now.'*  
(Contact Centre staff member, Trailblazer One)

It was reported that in order for all First Contact agents to feel able to handle such calls, it may be beneficial for agents to undertake training on handling difficult calls.

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<sup>37</sup> Now GOV.UK

<sup>38</sup> In this evaluation, a distinction is made between formal written complaints and verbal complaints or comments. A formal written complaint is regarded as one which had to be escalated beyond Team Leader Level. Verbal complaints are regarded as issues being reported to and dealt with by frontline staff.

## 5.6 Claimant views of hypothetical scenarios

Claimants were asked for their views on two hypothetical scenarios<sup>39</sup> to understand how they might feel in these situations and whether these scenarios might encourage them to make their claim online instead. The hypothetical scenarios were:

- (1) If upon calling the JSA claim telephone line, the claimant is given an appointment in three days time to make the claim by telephone.
- (2) If the only way to make a JSA claim is online.

In relation to scenario 1, online claimants and non-digital channel claimants who had tried to make an online claim said that they would rather claim online than wait three days for an appointment by telephone. Some claimants felt fine with the situation whilst others felt that it would be a disappointing situation to be in.

*'I can't see what is particularly wrong with that. But I would be tempted to claim online immediately rather than wait those three days.'*

(Independent online claimant, Trailblazer Two)

*'I wouldn't be happy about that. I have been in the situation where I have needed to claim as soon as possible as I've been short of money and out of work and I don't want to be sitting about waiting for someone to ring me when I have already rung them. Yes I would be straight on the laptop and would claim online.'*

(Nudged online claimant, Trailblazer One)

Amongst non-digital channel claimants who did not try to claim online, some said that they would be tempted to claim online instead of waiting three days, because they would not want the processing of the claim to be delayed. Others said that they would wait for three days as long as the claim date is backdated to the original date of contact, or because they valued the personal contact with a member of staff. Some were particularly understanding of the scenario, regarding it as symptomatic of the busy climate that Jobcentres are faced with.

*'I wouldn't mind. I know they are doing their best to provide a decent service. They might be busy and have too much work. As long as the claim is processed from the date the phone call is made rather than when the appointment is then I'd be fine with that.'*

(Non-digital channel claimant, Trailblazer Three)

*'I would still prefer to wait the three days than to go online. It is more personal and you actually know that your claim has gone through and has been received because you have spoken to someone in person.'*

(Non-digital channel claimant, Trailblazer One)

In relation to scenario 2, if the only way to claim JSA is online, a common view amongst online *and* non-digital channel claimants was that this would be fine for themselves at this point in time, but there was a strong feeling that an alternative

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<sup>39</sup> These hypothetical scenarios were later trialled as other Trailblazers.

channel such as the telephone should be in place for other groups or even themselves if they no longer had home broadband in future.

*'I like having the choice. I use the internet now but there is every likelihood that I could not afford broadband in the near future – in that case I would want to have the option to use the phone.'*

(Independent online claimant, Trailblazer Three)

*'I'm ok but other people who are older or blind would need other ways to claim.'*

(Independent online claimant, Trailblazer Three)

*'Yes I would be ok with that. But for some other people that perhaps cannot use computers that well may struggle.'*

(Nudged online claimant, Trailblazer One)

Others felt unhappy with the scenario. Reasons included a lack of internet skills, a concern that not everyone has internet access, or because of a need to speak to staff to ask questions. Claimants who were prompted to discuss the idea of being supported to claim online using a computer in a Jobcentre felt that this was a good idea, although concerns were raised that Jobcentres might become busy or that staff might not have the time to provide support.

The Government Assisted Digital paper,<sup>40</sup> published alongside departmental digital strategies, sets out a consistent approach to providing services to people who have rarely or never been online. Anyone who really needs support through other channels will be able to access a service face-to-face, by phone or in another appropriate non-digital way.

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<sup>40</sup> Cabinet Office (December 2012) Government Approach to Assisted Digital  
<http://publications.cabinetoffice.gov.uk/digital/assisted/>

## 6. Claimant experiences of using JSA Online and anticipated future use

### Summary

- Online claimants generally had a positive experience of using JSA Online to make their claim. Non-digital channel claimants who had attempted to make their claim online had experienced problems either because the question wording was perceived to be unclear or because they experienced technical difficulties on that occasion (such as their own internet connection failing or the online claim form having crashed). These problems prevented or deterred them from making an online claim. Some staff also reported receiving some negative feedback from claimants about the JSA claim form.
- Staff and claimants identified a number of potential improvements which could be made to the JSA Online claim form, which included improving the question wording and increasing the number of mandatory fields. Staff felt that a positive experience of claiming online would help encourage a claimant to make any future claims online.
- Online claimants generally felt they would claim online again in future, largely because they considered it to be convenient and easier.
- Some non-digital channel claimants said that they would claim online in future, provided that the system or their own internet connection worked, or if the question wording was clearer. Some said that they would be willing to make a claim online next time if they could have support to do so, for example at the Jobcentre or from a family member. Others felt they would never claim online because they did not have the skills or they preferred to speak to someone.
- It is important to note that in November 2012, since the interviews were undertaken, a number of changes have been made to the JSA Online claim form that may address some of the concerns raised in this chapter.

This chapter explores experiences of using JSA Online. These experiences are not necessarily a direct impact of the Trailblazers, as the same JSA Online claim form is available to use in non-Trailblazer districts. However, the experiences provide useful evidence for what makes a good quality digital service, and highlights areas for improving the JSA Online experience. It also examines whether claimants might be likely to use JSA Online again, indicating a potential longer term digital channel shift.

## 6.1 Claimant awareness of JSA Online

Online claimants were asked how they had heard about claiming online. Of the *independent online claimants*, a common theme was that they had found out following an internet search, as they had assumed that it was possible to claim online. Others had found out that it was possible to claim online by word of mouth, including from a friend or from Jobcentre Plus staff who had visited their previous employer at a time of redundancies. *Nudged online claimants* had predominantly found out that it was possible to claim online from the staff member they spoke to when they had rung the JSA claim line or visited a Jobcentre.

## 6.2 Where they claimed for JSA online

Online claimants were asked where they had accessed the internet to make their claim. *Independent online claimants* said that they had made their claim at home using their own computer or laptop. Of the *nudged online claimants*, some had accessed JSA Online from home and others said that they had used a computer elsewhere, either at a friend's house or at a local library or resource centre. Some *nudged online claimants* said that they had received support from someone else to complete their claim online. This included support from a third party organisation and from a family member.

## 6.3 Experiences of claiming online

Claimants who made or attempted to make an online claim were asked about their experiences of claiming online. Online claimants generally had a good experience of using JSA Online and said that claiming online had met or exceeded their expectations. Positive experiences included that the navigation and layout of the website had been easy to use, that they had experienced no difficulties and that it had been quicker and easier than claiming by telephone. Some claimants found the help facility on the online form very useful because it helped them to understand the questions.

Nevertheless, some online claimants reported problems with some of the questions. These problems included not being able to record the type of employment (casual hours) that they were in, not being able to return to a completed form to enter some missing information, and issues with the 'postcode' question. However, none of these issues had prevented them from submitting their online claim, and some claimants said that they took the additional information they had wanted to include to their initial Jobcentre interview. It was reported that there was not enough space within the text boxes of the online claim form to fully express everything that they wanted to include, such as further details relating to the job role of their previous employment and why they were claiming benefit.

*'Well I didn't think there was enough room on the online form to actually portray who you are or why [you are claiming benefit].'*  
(Independent online claimant, Trailblazer Two)

*Non-digital channel claimants who tried to claim online* had experienced problems with claiming either because the question wording was perceived to be unclear or because they experienced technical difficulties. This included their own internet connection failing or the online claim form having crashed. These problems prevented or deterred them from making an online claim.

Staff also reported receiving negative feedback from claimants on the JSA Online claim form. This feedback echoes the claimant findings in the paragraphs above, and included the claim form being unclear, not understanding the wording of the questions, not knowing the information required to be input onto the form (e.g. tax reference number), and not knowing whether they needed to claim income-based or contribution-based JSA. Staff said some Rapid Reclaim claimants had informed them that they had been unable to make their claim online; an issue reflected in section 6.4.

Staff suggested that problems with the online claim form had led some claimants to give up claiming online and re-contact the Contact Centre to pursue their claim by telephone, which is backed up by the experiences of non-digital channel claimants who had tried to claim online.

Other problems reported by staff included online claimants reporting that they had not received a text message informing them of the date and time of their Work Focused Interview, which had led to them failing to attend and/or being sanctioned. It was also stated that the JSA Online claim form is not supported by certain IT platforms such as particular smart phones or tablets, and so as a result some claimants are not able to use it.

Claimants who had used JSA Online were asked whether they felt like complaining during the process of completing the online claim form. The prevalent theme was that claimants did not feel like complaining. Amongst the online claimants who were interviewed in this study, one person said that they had verbally complained about a very specific error in their claim form but that it had been resolved.

Amongst non-digital channel claimants who tried but were unable to claim online, some said that they did not feel like making a complaint although others said they had made an informal verbal complaint to their Personal Adviser. This related to not being able to get through on the telephone and/or the quality of the online system. These issues are not necessarily linked to or a direct impact of the Trailblazer.

Online claimants were asked to recall how long it had taken to complete their claim online. The length of time recalled by claimants varied between ten minutes and an hour. Online Rapid Reclaims were generally reported to take a shorter amount of time, although there was one exception who said it had taken an hour which they found frustrating.

## **6.4 Rapid Reclaims online**

Rapid Reclaim claimants were asked for their views and experiences of making an online Rapid Reclaim. When asked whether it was quicker to make a Rapid Reclaim by telephone or online, a general view was that claiming by telephone was quicker,



particularly amongst non-digital channel claimants. One person felt particularly frustrated that it had taken a long time to make their Rapid Reclaim online.

*'It took me over an hour and I found it frustrating as I had claimed a month earlier so I expected the system to have all my relevant details still on it – you would think that under your National Insurance number there would be a system that holds your details so that you wouldn't have to put them all in every time that you apply.'*

(Independent online claimant, Trailblazer One)

Some Rapid Reclaim claimants said that they had been unable to make their Rapid Reclaim online or that they did not think it was possible to make a Rapid Reclaim online indicating that awareness of JSA Online was low amongst this claimant group.

## 6.5 How JSA Online could be improved

Trailblazer staff and claimants who had experienced using JSA Online were asked for their views on how to improve the JSA Online claim form and processing. Their suggestions included:

### 6.5.1 Before completing the claim form

- Ensure that the link from the main Direct.gov (now GOV.UK) home page to the JSA Claim Form is made more obvious.
- Ensure that the criteria for claiming JSA are made clear at the beginning of the claim form. For example develop a flowchart or crib sheet for claimants to follow. It was felt that the two types of JSA (contribution-based and income-based) could be better explained, so that claimants know which one they are entitled to claim.

### 6.5.2 During the claim form

- The online claim form needs more mandatory fields, drop down menus and question filtering, to help improve claim quality.
- Ensure that all of the questions on the claim form are more clearly worded.
- Enable claimants to put 'don't know' for certain questions, such as Tax District, to enable claimants to continue onto the next question.
- Ensure that the text boxes within the form enable claimants to fully explain personal circumstances; e.g. to be able to provide full details of previous employment.

### 6.5.3 After completing the claim form

- Ensure that at the end of the claim the claimant is provided with a clear message that fully explains how they will be contacted and when. The claimant who suggested this said that current messaging *'doesn't make it clear how or when or who by. I got a text message but I wasn't sure how I was going to be contacted.'*

- Better inform claimants of which items of identity and information to take to the Jobcentre (e.g. partner identification, bank statements) to save the Benefit Centre from having to re-contact a claimant.
- Find a way to ensure that online claims reach the Benefit Centre sooner than six to nine days to improve processing times. For example, ensure a claimant's Work Focused Interview (WFI) is booked in as soon as possible.
- Ensure claim forms are quality checked by Jobcentres at the NJI stage.
- Enable the processing of online claims to become digital as well. This is recognised in the DWP Digital Strategy which states that 'the potential savings to be achieved from shifting to digital channels can only be fully realised by transforming the complete end-to-end business process.'<sup>41</sup>

Staff felt that improving the claim form is a crucial aspect of increasing the proportion of claims made online. It was felt that a positive experience of claiming online would encourage a claimant to make any future claims online, and that negative experiences of the form and processing could be shared amongst claimants, discouraging them and others from claiming online. This is backed up by previous research with claimants who felt that online systems which do not work properly 'act as a disincentive to operate online,'<sup>42</sup> thus demonstrating the importance of ensuring the experience is positive at the first attempt.

#### **6.5.4 Changes to the JSA Online claim form since the research**

It is important to note that in November 2012, since the interviews were undertaken, a number of changes were made to the JSA Online claim form, in order to improve the experience for claimants, make the online application quicker and easier to complete, and ensure that the claim forms contain more complete and accurate information to help them be processed more quickly. Example changes include:

- 25 questions were made mandatory and 52 questions were totally removed or restructured, reducing the number of screens to complete;
- Questions were reworded where difficulties had been identified;
- The screen layout was made to look less cluttered;
- A "Save and Continue" button was introduced, enabling claimants to know that their information is being retained as they move through the application.
- The next steps page, produced on screen immediately after a claim is submitted, was reviewed to make clearer the requirements of what to bring to the Jobcentre interview.

These changes address some of the issues and ideas raised in this chapter. A short internal evaluation reported that staff had seen an improvement in the completeness of online forms following the changes made.

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<sup>41</sup> DWP Digital Strategy (December 2012)

[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/139489/dwp-digital-strategy.pdf.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/139489/dwp-digital-strategy.pdf.pdf) (DWP) p.11

<sup>42</sup> Adam, D. et al. (2011) *Increasing digital channel use among digitally excluded Jobcentre Plus claimants* DWP Research Report No 776 <http://research.dwp.gov.uk/asd/asd5/rports2011-2012/rrep776.pdf> p.31

## 6.6 Whether or not claimants would claim online next time

The widespread view amongst online claimants is that they would claim online in future, largely because they considered it to be convenient and easier (further details on perceived advantages of claiming online are in section 5.3). Some online claimants would rather not claim online next time, either because of negative experiences of claiming online or due to a preference for telephone contact and being able to talk to someone to ask questions.

Online claimants were also asked whether they would recommend JSA Online to family and friends. The widespread view was that they would recommend it, although it was apparent that negative experiences of claiming online can influence this.

Amongst *non-digital channel claimants who tried to claim online*, some said that they would claim online in future, provided that the system or their own internet connection worked, or if the question wording was clearer. An additional view expressed was that confidence in claiming online would increase with more experience.

*'I would feel more confident in claiming online the more times I have to do it.'*  
(Non-digital channel claimant, Trailblazer One)

Some said that they would claim online if elements of making a phone call could somehow be incorporated within the online system. For example, it was suggested that by being able to communicate with someone, perhaps through a live chat or messaging service during the online claim process, they would be able to ensure that their situation is correctly understood. However previous research with digitally excluded claimants has also suggested that some claimants have a lack of familiarity with pop-up chat facilities and are concerned that they might not be able to effectively communicate by keyboard.<sup>43</sup>

Some *non-digital channel claimants who had not tried to claim online* said that they would prefer to claim online next time. Some said that they would be willing to make a claim online next time if they could have support to do so, for example at the Jobcentre or from a family member, or if they had access to the internet. Others said that they did not think they would ever claim online. This was because they did not feel they had the skills or because they preferred to speak to someone.

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<sup>43</sup> Adam, D. et al. (2011) *Increasing digital channel use among digitally excluded Jobcentre Plus claimants* DWP Research Report No 776 <http://research.dwp.gov.uk/asd/asd5/rports2011-2012/rrep776.pdf> p.25

# 7. How to further promote claiming online

## Summary

- Staff and claimants suggested a number of ideas on what else DWP could do to promote claiming online. These ideas emphasised the importance of stronger and consistent messaging around claiming online and providing effective support to enable claimants to make their claims online.
- Staff also suggested a number of ways to improve the Trailblazers, including ensuring that front-facing staff know where to direct claimants to free sources of internet provision.

## 7.1 Encouraging further take-up of JSA Online

Staff and claimants were asked for views on what else DWP could do to encourage the take up of JSA Online. A range of ideas were suggested, summarised below:

### Stronger messaging

- Increase awareness by better advertising of JSA Online to potential claimants. It was suggested that the time of claiming may not be the best moment to promote claiming online as it can be an emotional time, and that suitable 'pinch points' should be identified at which to tell claimants that they can claim online if they need to do so again in future;
- Ensure that 'digital by default' is communicated to and by employers to their employees who may be made redundant;
- Inform claimants that it is easier to claim online;
- Ensure that DWP frontline staff have confidence when promoting JSA Online, emphasising the benefits to the claimant. It was suggested that 'selling' online claiming is much more about *how* things are said rather than *what* is said. It was also stated that different reasons for using JSA Online would be more appropriate for specific sub-groups of claimants. For example, a member of staff suggested that a claimant with a professional background might be persuaded to claim online upon being informed that they would be able to claim from their own home, thus spending minimal time in the Jobcentre, whilst this argument might not appeal to a claimant who requires more support, such as a school leaver.

## Consistent messaging around claiming online

- Ensure that all staff who have contact with claimants across all three delivery arms (Contact Centres, Jobcentres and Benefit Centres) promote claiming online. It was suggested that communication could be improved between different operational sites to reassure staff that all parts of the business are giving a consistent message to claimants around claiming online.

## Support

- Provide more assistance in Jobcentres to support people with claiming online. This includes providing computers with free internet access at the Jobcentre and support from staff to those who need assistance in completing the claim. As one claimant said,

*'There should be internet access at the Jobcentre so people can apply online there. And it should have extended opening hours so it's convenient for people.'*

(Non-digital channel claimant, Trailblazer Three)

Since the research, Internet Access Devices have been deployed across the majority of the national Jobcentre network.

- Explore the feasibility of developing a 'Live Chat' function within the online claim form, so that claimants can directly communicate with a member of staff online if they require support.

## Channel withdrawal

- Consider removing the telephony option for claimants who are able and eligible to claim online.

## 7.2 Potential improvements to the Trailblazers

Staff were asked for their views on ways to improve the Trailblazers ahead of their potential roll-out. These can potentially help to further drive-up online claims. Some ideas were specific to particular Trailblazers whilst others were more general and applied to all three.

### Knowledge of local sources of internet provision

Staff felt that it would be important to ensure that front-facing staff have a good knowledge of free local sources of internet provision (e.g. libraries and other services). In Contact Centres it was acknowledged that this might be a particular challenge where First Contact Agents could be taking calls from anywhere in the country.

*'You need to know where the free services are. I know some places but not others because I know where the customer is and where there are services close by but this will be different when you have a customer from a different part of the country.'*

(Contact Centre staff member, Trailblazer One)

## **Communications in advance**

As shown in section 3.1, a widespread view amongst staff was that communications on the Trailblazers had been informative. When asked what needed to be borne in mind for rollout, some staff emphasised the need for clear communications. It was suggested that the amount of information contained within the training packs could be reduced, and that more detail could have been included on *why* the Trailblazers are taking place.

## **Helpdesk training**

As identified in section 3.2, not all Helpdesk agents felt sufficiently able to answer JSA Online calls. It was suggested by a member of staff that benefits training could be provided to Helpdesk agents to boost their confidence in taking calls, and that tools such as screen shots of the claim form could be improved by making them clearer and larger.

## **Trailblazer One – First Contact Skills**

As reported in section 3.2, effective influencing skills are considered useful in encouraging callers to claim online. It was suggested that First Contact Agents with the right skills could be selected to take JSA calls, who can use their persuasion skills during the entire call to persuade a caller to go online.

## **Trailblazer Two – Longer wait time**

It was suggested that Trailblazer Two was not having as great an impact as it could be, and that a five minute wait time was not long enough, because claimants could be used to waiting on the phone. It was felt that a ten minute wait time might produce a more noticeable impact. This is reflected in the findings in chapter 2.

## 8. Conclusions and recommendations

### 8.1 Evaluation success factor one – Increasing JSA Online take-up

- JSA Online **take-up increased** in all three Trailblazers (by between 2.0 and 5.8 percentage points more than average increase in take up in non-Trailblazer districts over a 12 week period). The first evaluation success factor was met.
- Persuading callers to claim online and informing them where they can access the internet was more successful than increasing waiting times or promising to prioritise online claim processing.
- The effects are likely to be lasting – at least some claimants will claim online again next time.
- But the modest level of increase, from what was a relatively low base, means that **other methods may be needed to meet the Department’s JSA Online take-up aspiration of 80 per cent by September 2013, and make the step change to be ‘digital by default’.**

### 8.2 Evaluation success factor two – No significant operational burdens

- There was no evidence of large scale operational impacts at the modest level of additional online take-up observed in the Trailblazers. Evaluation success factor two was met.
- Some findings suggest that shifts to JSA Online may not necessarily be accompanied by cost savings e.g. Trailblazer One had no significant impact on average call length, and staff said a considerable proportion of online claims were incomplete requiring extra processing work in Benefit Centres.
- However, over time as claimants become more aware that claiming online is the norm, JSA telephony claim call volumes are likely to decrease.
- **Further research and analysis is required to understand and determine the longer term resource impacts of a much higher take-up of JSA Online.**

## 8.3 Evaluation success factor three – Positive customer experience

- Evaluation success factor three (a positive customer experience including a minimal impact upon complaints) was mostly met. This is on the basis of small scale Trailblazers and **customer experience needs to continue to be monitored as the volume of claims made online increases**. Some claimants experienced a problem when using JSA Online and so changes are needed to ensure a better customer experience for all claimants (see section 8.4). The changes made to the JSA Online claim form since this research took place (as outlined in section 6.5) help to address this.
- The opportunity to claim online was generally regarded positively although staff and claimants felt there should be a choice in how to make a claim.
- Online claimants generally had a good experience of using JSA Online, and valued its flexibility and convenience. Some who experienced problems that prevented them from claiming online said they would try again in future.
- There were no formal written complaints about the Trailblazers, and whilst there were a few instances of verbal complaints in Trailblazer One Jobcentres these were resolved without needing further escalation.
- Call outcome monitoring (Table 2.2) showed that around a quarter (24.4 per cent) of JSA claimants were ineligible to claim online. However Trailblazer Two increased waiting times for all claimants, regardless of whether or not they were eligible to claim online. **The Department should take care to ensure that those genuinely unable to claim online are not disadvantaged.**

## 8.4 Achieving digital channel shift

- There is scope to further increase JSA Online take-up. The research identified a group of non-digital channel claimants who had wanted to claim online but failed in their attempt, who would try to claim online in future provided that they did not experience a problem. **The design and usability of online forms is important to ensure that those who are keen to claim online are not discouraged.**
- Some claimants would be willing to make a claim online next time with support. The introduction of Internet Access Devices in Jobcentres has provided claimants with access to the Internet and, where appropriate, support from staff.



- Some claimants do not wish to claim online, either due to a lack of skills or a preference for human contact. **Other methods are needed to help persuade more reluctant but able claimants to claim online, and non-digital channels should remain for those genuinely unable to claim online.** An assisted digital strategy is key to ensure access to all.
- This is backed up by previous research with digitally excluded claimants which concluded that more long-term and resource intensive strategies may be required to ‘address the needs of claimants with multiple barriers’ to using digital services<sup>44</sup>. Support for digitally excluded claimants is also addressed in the DWP Digital Strategy which recognises the need for assisted digital services for those who have rarely or never been online, and for telephony and face to face channels to provide a ‘safety net’ for those who cannot use digital services even with support.<sup>45</sup> The Government Assisted Digital paper, published alongside departmental digital strategies, sets out a consistent approach to providing services to people who have rarely or never been online. Anyone who really needs support through other channels will be able to access a service face-to-face, by phone or in another appropriate non-digital way.

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<sup>44</sup> Adam, D. et al. (2011) *Increasing digital channel use among digitally excluded Jobcentre Plus claimants* DWP Research Report No 776 <http://research.dwp.gov.uk/asd/asd5/rports2011-2012/rrep776.pdf> p.52

<sup>45</sup> DWP Digital Strategy (December 2012) [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/139489/dwp-digital-strategy.pdf.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/139489/dwp-digital-strategy.pdf.pdf) (DWP) p.20

# Annex A Further details of quantitative methodology

It was not possible to implement a randomised control trial due to difficulties in assigning claimants to random groups. For example it is not practical to randomly assign customers to 2 different telephone numbers to call for their JSA application. Therefore tests were run at district level, so that all claimants within a specific geographic region were targeted. To evaluate the impact a simple version of the difference-in-differences (DiD) methodology has been used to estimate the additional increase in JSA online take-up resulting directly from the Trailblazers.

This version of DiD methodology can under-estimate standard errors, which means there is an increase in the probability of spurious positive results. It also means that confidence intervals around the effect size are also under-estimated. However, this version has been chosen as it has been quicker and more cost effective to implement in this instance than the more accurate versions suggested by Cameron et al<sup>46</sup> for example.

Under the current approach it is assumed that the relationship between the chosen districts and national figures are consistent, there are no “composition effects” and no “cluster effects”.

Composition effects can occur due to changes in demographics within a region. For example if 18-24 year olds are known to be more likely to claim online, then an increase in online up-take could be a result from a greater proportion of 18-24 year olds in the claimant population. Such composition effects are not explicitly controlled for in our methodology, so an analysis is presented to show composition effects are not likely to be a serious issue in this case.

Cluster effects can occur because geographic regions have been grouped together. If an event unrelated to the Trailblazer occurs and affects everyone in the geographic region, this will affect the results. This is known as a “shock”. These shocks can persist for more than one time period, causing serial correlation issues that increase the chance of spurious positive results<sup>47</sup>.

## Historical Data

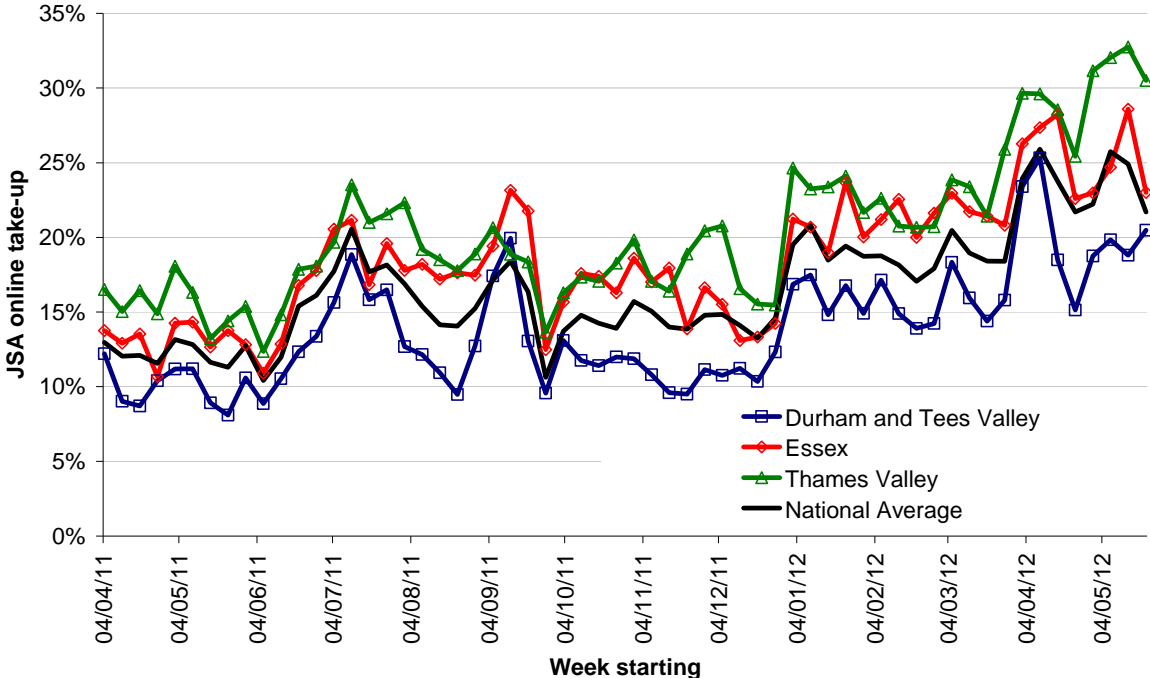
A key assumption underlying the DiD technique is that trial and control areas should have a consistent relationship. The chart below shows that rates of JSA online up-take for Trailblazer districts have strongly tracked the national average rate for the 12 months prior to the Trailblazers.

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<sup>46</sup> Cameron, C et al (2008) *Bootstrap- based improvements for inference with clustered errors* Review of Economics and Statistics 90:3 p.414

<sup>47</sup> Bertrand, M. et al (2004) *How much should we trust differences-in-differences estimates?* Quarterly Journal of Economics p.249

**Figure A1 Chart of historic JSA Online uptake**



**Composition Effects**

Changes in the composition of the demographics of Trailblazer districts could potentially increase the JSA online uptake compared to the non-Trailblazer districts. These have not been controlled for in the main methodology, so separate tests have been done to ascertain if these have had an impact.

**Table A1 Demographic Effects Difference-in-Differences (DiD)**

District	Gender	Age	ESA History	Total
Durham	0.229%	0.171%	0.556%	0.956%
Durham DiD	-0.137%	-0.062%	0.190%	<b>-0.008%</b>
Essex	0.266%	0.037%	0.194%	0.497%
Essex DiD	-0.100%	-0.195%	-0.172%	<b>-0.467%</b>
Thames	0.288%	0.016%	0.541%	0.845%
Thames DiD	-0.078%	-0.217%	0.176%	<b>-0.119%</b>
Non-Trailblazer	0.366%	0.233%	0.366%	0.964%

The effects of gender, age and history of ESA were tested. As can be seen in the table above, all three districts had an increase due to demographic effects. However, the important factor is whether these have a bigger effect than in the non-Trailblazer districts. The difference-in-differences, calculated by subtracting the effects from the non-Trailblazer effects show that these were not as strong as the effects due to

demographics in the non-Trailblazer districts. This means that in the Trailblazer districts, demographic changes had a negative effect compared to the non-Trailblazer districts, supporting the finding that the Trailblazers are statistically significant.

**Tests of Fictional Programmes**

A series of tests were used to check the validity of this simple version of the DiD approach, in this particular context. This involved testing the other 34 districts alongside the Trailblazers and all 37 districts over 3 other time periods to check how many would produce a significant result with no Trailblazer. Ideally these fictional programmes should show as positive around 5% of the time.

**Table A2 Fictional Programmes**

Time period	Significant	Districts tested	Proportion		
			significant	CI -	CI +
Trailblazer (28th May 12 to 19th August 12)	2	34	5.9%	1.8%	9.9%
27th February 12 to 20th May 12	11	37	29.7%	22.0%	37.5%
5th December 11 to 26th Feb 12	3	37	8.1%	3.6%	12.7%
12th September 11 to 4th December 11	3	37	8.1%	3.6%	12.6%
<b>Total</b>	<b>19</b>	<b>145</b>	<b>13.1%</b>	<b>7.6%</b>	<b>18.6%</b>

As can be seen from the table above, the number of districts that show an effect are significantly above the amount that would be expected by random chance. An effect size of 2 percentage points as seen in Trailblazer 2 was found in 7.4% of cases, which is higher than the standard significance of 5%. Effect sizes of 5.8 percentage points (Trailblazer 1) and 4.5 percentage points (Trailblazer 3) were only found in the Trailblazers.

**Confidence Intervals**

A confidence interval is a range that we believe will contain the true effect size most of the time (in this case 95%). Since the standard errors<sup>48</sup> are an under-estimate in the current methodology, this means that confidence intervals are also under-estimated. They are given below for completeness.

**Table A3 Confidence Intervals**

	Effect Size	CI -	CI +
Trailblazer 1	5.8	4.2	7.5
Trailblazer 2 overall	2	0.1	4
Trailblazer 2 - 5 minute wait	-	-0.8	3
Trailblazer 2 - 10 minute wait	4.7	2.7	6.7
Trailblazer 3	3.1	0.6	5.7

<sup>48</sup> Standard errors are statistical constructs that are used to calculate statistical significance and confidence intervals.

## Further Minor Caveats

The points below, whilst not likely to be serious, could also potentially affect the accuracy of the results presented in this report.

- The post code selector used to separate out Trailblazer calls is not always accurate – if a post code is not recognised then callers will divert to National call lines, and so not be given the Trailblazer treatment. The effect of inaccuracy in the post code locator could be to depress the measured effects. Comparison of volumes of calls logged, and claims received by phone implies that post code identification accuracy is greater than 90%.
- Measure accuracy issues referred to above – the online claim indicator in JSAPS is not always accurate (around 20% of online claims are not recorded as such). Although results presented are accurate in terms of the measure, it is likely that the true impact on online claims will be higher than stated.
- As with any Trailblazer, a district is put under the spotlight by running such a trial, which can mean that other actions are taken to improve performance. For example the Trailblazers uncovered some instances where Jobcentre staff were still signposting customers towards making telephone claims. By bringing these cases to light the Trailblazers helped ensure more consistent messaging. The impact of this effect, if present, would be to increase the estimated effect sizes.

## Conclusion

The simple version of the DID approach used in this report gives a useful indication of the effectiveness of the Trailblazers. However, caution needs to be exercised in the interpretation of its results, since this approach under-estimates the size of the standard errors and therefore can produce spurious positive results more often than the commonly accepted level of 5% and increase uncertainty around the effect sizes.

# Annex B Further details of qualitative evaluation methodology

## Staff interviews

26 telephone interviews were carried out with front-line operational staff from a range of operational sites including Contact Centres, Jobcentres and Benefit Centres in the Trailblazer districts.

The staff sample was chosen purposively to ensure that the interviews covered all of the job roles that were anticipated to be most greatly affected by the Trailblazers, to ensure that a wide variety of relevant views could be captured. These job roles included:

### Contact Centre job roles:

- First Contact Agents
- Self-service Helpdesk staff
- Customer Feedback Focal Points
- Contact Centre Team Leaders and Managers

### Jobcentre job roles:

- Jobcentre Managers and Customer Service Operations Managers
- Customer Service Managers
- Digital Champions
- JSA New Claims Team Leaders

### Benefit Centre job roles:

- JSA Claim Processors
- JSA Team Leaders

A breakdown of the number of staff interviews undertaken by Trailblazer and type of operational site is shown in Table B1.

**Table B1 Number of staff interviews conducted by Trailblazer and site**

	Contact Centre	Jobcentre	Benefit Centre**	Total
Trailblazer 1	7	3	n/a	<b>10</b>
Trailblazer Two	5*	3	n/a	<b>8</b>
Trailblazer 3		4	4	<b>8</b>

\*These Contact Centre staff were taking calls from claimants in Trailblazers Two and Three and so were able to comment on both Trailblazers.

\*\* Interviews with Benefit Centre staff were focused on Trailblazer 3 because this was where the greatest impacts were anticipated, given it involved prioritising the processing of claims made online.

Staff were sent an information sheet outlining the purpose of the research, the expected time commitment and that taking part would be entirely voluntary. They were then asked to provide their consent to take part.

### **Claimant interviews**

The claimant research involved 35 telephone interviews with JSA claimants who had claimed online and those who had claimed by a non-digital channel from each of the three Trailblazer districts.

A random stratified sample of JSA claimants was extracted from departmental databases<sup>49</sup> in early August 2012. The sample comprised 616 JSA claimants who made a JSA claim between 25<sup>th</sup> May 2012 (when Trailblazers 1, 2 and 3 started) and 10<sup>th</sup> August 2012 (when the sample was produced). The sample was structured to ensure that it included claimants who made their claim using JSA Online and claimants who made their claim by a non-digital channel, from each of the three Trailblazer Districts. It included claimants who had made a previous application in the last 6 months and those who had not, to help ensure that the sample included claimants who had made a Rapid Reclaim (which can be made by a claimant to quickly and efficiently reinstate a JSA claim made in the previous 26 weeks, providing that they have had no relevant changes of circumstances) and claimants who had made a full claim. The sample excluded claimants who had incomplete contact details, because both an address and a telephone number were required in order to contact the claimant to send the opt-out letter, obtain informed consent and undertake the interview.

For the Trailblazer One claimant sample only, additional Management Information was available which identified a call outcome code (see Table 1.2) for each call made to the JSA Claim telephone line, as allocated by the First Contact agent at the end of the call. This was used to improve the quality of the sample by helping to ensure that every claimant within the Trailblazer One sample had called the Contact Centre (and thus had experienced the Trailblazer script) before making their claim either online or by a non-digital channel. The sample included online claimants who were recorded as Options 1, 2, 3 or 4, non-digital channel claimants who were recorded as Options 1, 2, 3 or 4, and non-digital channel claimants who were recorded as Option 6. Claimants who were recorded as Option 5 were excluded from the sample as there was a clear reason for not claiming online which meant they would not be signposted online by the First Contact Agent (i.e. not having access or skills). Claimants recorded as Options 7 and 8 were also excluded because these were ineligible or inappropriate for claiming JSA online.

Opt-out letters were sent to all 616 claimants, to explain the research aims and to provide claimants who did not wish to take part in the research the opportunity to opt-out by telephone, Freepost or email. Claimants were informed that participation in the research was voluntary and that whether they chose to take part or not, it would not affect any current or future claims for benefits or tax credits. In total, 56 claimants (9 per cent) opted out of the research. Further details are provided in Table B2.

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<sup>49</sup> Claimants were sampled from the Atomic Data Store (ADS).

**Table B2 Opt outs received from claimants**

<b>Total number in sample</b>	<b>616</b>
<b>Opt outs</b>	
By telephone	2
By email	1
By Freepost	53
<b>Total</b>	<b>56</b>
<b>Opt outs</b>	
From Trailblazer 1	22
From Trailblazer 2	19
From Trailblazer 3	15
<b>Total</b>	<b>56</b>
<b>% Opt outs prior to research</b>	<b>9.09%</b>
<b>Undelivered and returned to sender</b>	<b>5</b>

Following the two-week opt-out period, claimants who had not opted out were contacted by DWP researchers to seek their consent to take part in a telephone interview. Claimants were reminded that the research was voluntary, that they would not be identifiable in the published report and that they could withdraw from the interview at any time. Interviews usually lasted between five and ten minutes. All interviews took place within DWP buildings and were recorded (if consent was given by the interviewee) using encrypted digital recorders.

A full breakdown of the number of claimant interviews undertaken is in Table B3.

**Table B3 Claimant interviews**

	JSA Online claimants	JSA non-digital channel claimants	Total claimants interviewed
Trailblazer 1	6	8	14
Trailblazer 2	5	6	11
Trailblazer 3	5	5	10
<b>Totals</b>	<b>16</b>	<b>19</b>	<b>35</b>

The original intention was for the online claimant interview quota to be made up of those who had been influenced by the Trailblazer in their decision to claim online. However, in reality, outside of Trailblazer One where Management Information was available to indicate who had rung the Contact Centre first before making an online claim, it was difficult to find such claimants from Trailblazers Two and Three. Potential reasons for this included:

- a relatively low impact of Trailblazers Two and Three on JSA Online uptake (i.e. the quantitative evaluation showed that a relatively small proportion of Trailblazer Two and Three claimants were persuaded online by the IVR messaging);



- not being able to remember if they had initially called the Contact Centre before making their claim.

Therefore the online interview quota definition for Trailblazers Two and Three was extended to include claimants who had claimed online independently of the Trailblazer (i.e. they had not rung the Contact Centre first). This has generated advantages for the study as it has been possible to identify differences in views within the online claimant group, between those who independently claimed online and those who were ‘nudged’ online (see chapter 5). The limitation is that the ‘independent online’ group was not directly affected by the Trailblazers.

Claimants were asked to provide their diversity characteristics at the end of the interview, for monitoring purposes to check a reasonable spread of interviewees across different groups. Diversity characteristics of the claimant interviewees can be found in Tables B4 – B7.

**Table B4 Age profile of JSA claimant interviewees**

<b>Age range</b>	<b>Number of interviewees</b>
18-24	8
25-34	6
35-44	6
45-54	11
55 or over	4
<b>Total</b>	<b>35</b>

**Table B5 Gender profile of JSA claimant interviewees**

<b>Gender</b>	<b>Number of interviewees</b>
Female	18
Male	17
<b>Total</b>	<b>35</b>

**Table B6 Ethnic profile of JSA claimant interviewees**

<b>Ethnicity</b>	<b>Number of interviewees</b>
White British	28
Non White British	6
Not stated	1
<b>Total</b>	<b>35</b>

**Table B7 Health profile of JSA claimant interviewees**

<b>Long term illness, health problem or disability</b>	<b>Number of interviewees</b>
No	30
Yes	3
I do not know/I do not wish to say	2
<b>Total</b>	<b>35</b>

# Annex C Example staff topic guide

## Trailblazer Two and Three Contact Centre Staff

### Background and introduction

Hello my name is \_\_\_\_\_ and I'm a researcher working in the Cross Cutting Delivery Analysis Division in Strategy Group. I'm doing some staff interviews as part of the evaluation of the JSA Online Trailblazers.

You've been selected to take part in the research because we would like to gain your feedback on the Trailblazer in terms of their impact upon your job, workload, resources and how successful you feel they have been in encouraging customers to claim for JSA using JSA Online. You should have received an information sheet explaining the research which was sent in May 2012.

All the answers you give me will be strictly confidential and anonymous. Your views will be used to inform the research but you will not be identifiable.

The interview will last around 20-30 minutes, and you can stop the interview at any time.

Are you happy to continue with the interview? Yes / No (Make sure their answer is recorded).

If possible I would like to record the interview, as it will help me to write up notes from the interview later on. Please note only the staff working on this evaluation would be able to have access to the recordings and notes, and the recording will be deleted as soon as the notes have been written up.

Are you happy to be recorded? Yes / No (Make sure their answer is recorded)

Do you have any questions before we start?

**Ask questions of all Contact Centre staff unless specified in the codes: FCA = First Contact Agents; CFFP = Customer Feedback Focal Point; TL = Team Leader, Contact Centre Manager = CCM**

### 1. Impacts on individual job role and workload – All

- Please could you confirm your job role? What does this usually involve?
- Since the Trailblazer started has your job role changed in any way?
- How confident do you feel about working differently in your role?
- Check – have you dealt with calls from the Trailblazer districts?

### 2. Customer attitudes and complaints

#### TB2 Customer attitudes – All

All JSA customers from Trailblazer Two who ring up First Contact to claim JSA, experience and are informed of a five minute delay before they get through to you. We just want to ask a few questions around if and how this might impact upon **customer attitudes**, if at all.

- What do you feel have been the main impacts upon the First Contact team of dealing with calls from Trailblazer Two customers who have experienced a 5 minute delay?
- Have you noticed any changes in the attitudes / behaviours of customers who get through to the claims line, since the Trailblazer started?
- Do customers ever mention the 5 minute delay they have experienced?
- Do customers ever enquire about being able to apply on-line once they get through to you? If they demonstrate an interest in applying on-line, do you signpost them to online?
- Do customers ever mention any reasons for not wanting to apply for JSA online? If so what are these reasons?
- Do you have additional script information that helps you explain to a customer the queue waiting time? If so is it useful? What does it say? Do you use it often?
- How confident do you feel in being able to resolve customer queries in relation to this trailblazer?

### **TB3 Customer attitudes – All (but explore fully with CFFP)**

All JSA customers from Trailblazer Three who ring up First Contact to claim JSA, are informed that JSA claims made on line are processed as a priority over claims made over the telephone, before they get through to you. We want to ask a few questions around if and how this might impact upon **customer attitudes**.

- What do you feel have been the main impacts upon the First Contact team of dealing with calls from Trailblazer Three customers who have been informed that JSA claims made on line are processed as a priority over claims made over the telephone?
- Have you noticed any changes in the attitudes and behaviours of customers who get through to the claims line, since the Trailblazer started?
- Do customers ever refer to or query the message that on line claims are prioritised?
- Do these customers ever enquire about being able to apply on-line once they get through to you? If they demonstrate an interest in applying on-line, do you signpost them to online? e.g. emphasising that JSA Online claims are prioritised?
- Do customers ever mention any reasons for not wanting to apply for JSA online? If so what are these reasons?
- Do you have additional script information that helps you explain to a customer the prioritising of on-line claims? If so is it useful? What does it say? Do you use it often? How confident do you feel in being able to resolve customer queries in relation to this trailblazer?

### **Customer Complaints - All**

- Have you noticed any change in the number of complaints received at the Contact Centre since the Trailblazers started?
- If so, what are the complaints about? *Probe fully – are they linked to a particular Trailblazer? If so which one?*
- Are they being handled at the Contact Centre level? *Probe – if complaints are not dealt with at CC then how and who deals with them?*
- (If experienced an increase in complaints) do you have adequate resources to respond to complaints?

### 3. Impacts upon Contact Centre resources

#### Impacts of the Trailblazers on resources – FCA, TL, CCM

*Note: Might need to explore TB2 and TB3 together, as the Contact Centre is managing calls from both of these Trailblazer districts.*

We want to ask a few questions around whether and how the Trailblazers might be impacting upon **team resources**.

- What do you feel have been the main impacts upon resources in the First Contact team of the **5 minute delay**?
- Have you ever been inactive whilst claimants are in the virtual queue?
- What do you feel have been the main impacts upon resources in the First Contact team of **dealing with calls from customers who have been told that online claims are processed as a priority over claims made over the telephone?** (e.g. do you think fewer customers choose to claim using the telephone?)
- Since the trailblazers began, have you noticed any impact on the number of calls you take per day?
- Has the average call length changed in any way? If so how? (e.g. longer, shorter)
- **FCA** Have the Trailblazers had any impact upon resources within your team?
  - *e.g. explore whether staff have been required to work longer hours?*
  - *Work differently in any way?*
  - *Have staff been moved across teams to deal with work demands?*
  - *Restructuring?*
  - *Creation of new teams?*
  - *Work you can no longer do?*
- **TL / CCM** Have the Trailblazers had any impact upon resources within the Contact Centre?
  - *Are there ever periods where agents are inactive but customers are in a virtual queue?*
  - *Explore whether staff have been required to work longer hours?*
  - *Work differently in any way?*
  - *Have staff been moved across teams to deal with work demands?*
  - *Restructuring?*
  - *Creation of new teams?*
  - *Work you can no longer do?*
- **TL / CCM** How manageable has the impact upon resources been?
- **TL / CCM** How sustainable is it to manage the different way of working following the trailblazer? (*explore sustainability of working in this different way.*)

- *(If appropriate)* Has the pressure on resources eased through time?

#### **4. Attitudes towards and understanding of JSA Online – All**

- Was any comms provided to let you know about the JSA Online Trailblazers? (*Probe – formal guidance, communications from line manager, etc*). How did you find the comms?
- What are your views on encouraging claimants to claim for JSA online rather than by telephone?
- Do you understand why DWP is trying to increase the proportion of claims made online? (*probe – are they aware of the target for 80 per cent of claims to be online by September 2013?*)
- Has your level of understanding in terms of why we wish customers to use JSA Online changed since the JSA Online Trailblazers? (e.g. have you seen more comms in relation to JSA Online and channel shift since becoming involved in the Trailblazers?)
- How confident are you to be an advocate of online service delivery? Can call agents confidently explain the process and benefits of claiming JSA online?

#### **5. Thoughts on success and lessons learnt – All**

- Do you have a feel for whether or not the trailblazers are making a difference in terms of increasing the proportion of claims made on-line?
- Which Trailblazer do you think has made the biggest difference? (*Note they may not know*)
- If the Trailblazers are rolled out to other Districts, is there anything that needs to be borne in mind in other Contact Centres?
- What lessons does DWP need to learn from your experiences?
- What else could DWP do to encourage the take up of JSA Online?

Thank you for your time. Is there anything else you would like to add that we haven't already covered?

# Annex D Example claimant topic guide

## Background and introduction

Hello, can I speak to [respondent name]? *Once you have confirmed that it is the right person, continue with the script.*

- *If you speak to another member of the household do not reveal any participant details. If pushed it is acceptable to say that it is the Department for Work and Pensions and it is nothing to worry about. Try to ascertain when the person will be in and call back later.*
- *If you get through to an answering service do not leave a message.*
- *If it is a wrong number, apologise and end call.*

My name is \_\_\_\_\_ and I'm a researcher working for the Department for Work and Pensions.

You should have had a letter from us about some research we are doing on claiming JSA. We want to find out customers' views on claiming JSA, either online or by telephone, in order to help us improve our services. We are doing this by doing telephone interviews with JSA customers. As you have made a claim for JSA we would like to ask you to take part in the research. We will keep all your answers confidential. Whether you to take part or not, it will not affect your current or future claims for benefits or tax credits.

Please can I ask you some brief questions about you and your claim for JSA? (if asked - it will take around 15 minutes.)

**Yes / No (please note down)** *(If no – would they be willing to take part in an interview at a different more convenient time?)*

***Provide reassurance on confidentiality:*** We will treat anything you tell me during the course of the research in confidence. We will not pass your personal information to anyone outside the research team. No-one will be able to identify you in our published results. You do not have to take part in the research and can change your mind at any time during the interview.

I would like to record the interview to help us make sure we get your answers. Our research team are the only people who will listen to the recording and we will destroy it at the end of the project. Are you happy to be recorded?

**Yes / No (please note down) [if no, do not record]**

If you do not wish to answer any of the questions, please just let me know and we can skip over them.

Do you have any questions before we start?

## 1. About your claim

So before we start the main questions I'd just like to first of all ask you a few questions about claiming JSA.

1a. Have you made a claim for JSA in the last 3 months / since 25<sup>th</sup> May?

Yes/No

If the answer is yes, (i.e. since the Trailblazers started) continue with the interview.

**If respondent has not made a claim for JSA since 25<sup>th</sup> May, terminate the interview. *We are only interested in JSA claimants since the Trailblazers began.***

### READ OUT

I am sorry to say that you actually fall outside of the range of people that we need to recruit as part of this study. [Apologise for taking up respondent's time. If asked, explain that report is likely to be available early next year from the research publications section of the DWP website.] ***Thank and close***

1b. READ ONE: (*only read out the one that is relevant according to our sample records*)

***If telephony ("standard channels") marker on sample: Did you make this claim over the telephone?***

[OR]

***If JSA Online marker on sample: Did you make this claim on the internet using JSA Online on the Directgov website?***

- Over the telephone
- Internet using JSA Online

1c. Was your most recent claim a Rapid Reclaim?

(Check and probe - did it involve a shorter claim process because you had already claimed JSA recently in the previous 26 weeks, and had no changes of circumstances?)

**GO TO ONE OF THE FOLLOWING SECTIONS:**

**2B – Trailblazer Two, Online Claim**

**2E – Trailblazer Two, Telephony Claim**

## 2B. Claiming JSA Online – Online claimants only, Trailblazer Two

### *Exploring whether the Trailblazer encouraged JSA Online use*

- 2.1 a) Before you applied online, did you contact Jobcentre Plus by telephone first? Yes / No If no, check: b) So you didn't contact the JSA Claims line first?

If they did not, and quotas for those who did not ring the Contact Centre first before claiming online have been filled, please screen out – we want to talk to enough customers who rang up first before claiming online. If quotas haven't been filled continue to 2.5.

#### READ OUT

I am sorry to say that you actually fall outside of the range of people that we need to talk to as part of this study. On this occasion we would like to speak to customers who rang up the JSA Claims line first before making an online claim. [Apologise for taking up respondent's time. If asked, explain that report is likely to be available early next year from the research publications section of the DWP website.] **Thank and close**

- 2.2 **If yes to 2.1a:** do you remember hearing a recorded message informing you of a 5 minute wait time, and letting you know that you can apply on line by visiting the website at [www.direct.gov.uk](http://www.direct.gov.uk)?
- 2.3 **If yes to 2.1a:** did this recorded message encourage you to claim online? Why / Why not?
- 2.4 **If yes to 2.1a:** How did you feel about being asked to claim online?  
*Probe: Were you surprised about being asked to claim online? Yes / No Why / Why not*
- 2.5 **ALL** How did you first hear about the JSA Online service?  
*Probe – On the JSA Claims line, at the Jobcentre, Friends/family, Other*
- 2.6 Please could you tell me why you claimed for JSA Online rather than on the telephone? (Explore reasons for going online – probe time of day? quicker? Other reasons? Waiting time on the phone?)
- 2.7 Where did you access the JSA Online website from? (*Probe – was it your own PC, friends/family PC, library access, internet café, other etc?*)

### *Exploring experiences of using JSA Online*

- 2.8 How did you find the experience of applying for JSA Online? (*probe – positive, negative experience? Why?*)
- 2.9 Did applying for JSA Online meet your expectations? (*probe – was it better or worse than you thought it might be?*)



- 2.10** What advantages do you think claiming for JSA Online has over claiming by telephone? What advantages are there to claiming by telephone?
- 2.11** Thinking about your most recent experience of using JSA Online, what are your views on the JSA Online application process?
- *Probe – positive / negative experience*
  - *Navigation of web site*
  - *Layout of internet pages*
  - *Language used in application process*
  - *How quickly the process was in getting a decision.*
- 2.12** How long roughly did the application take to complete? (*Please note they may not be able to remember – probe was it more or less than an hour?*) **Was this longer or shorter than expected?**
- 2.13** Did you experience any difficulties during your JSA Online Application?
- *Probe – what difficulties?*
  - *How did individual resolve difficulties?*
- 2.14** Did you ever feel like complaining at any point during the process? If so, when / why did you complain? Who did you make the complaint to?
- 2.15** Would you be willing to use JSA Online again in the future if you needed to claim the benefit again?
- *Probe if yes why?*
  - *If no why?*
- 2.16** Would you recommend JSA Online to family and friends?
- 2.17** How should JSA Online be improved?
- 2.18** If a Rapid Reclaim customer –
- **Claiming for a Rapid Reclaim takes less time than for a normal full claim. Did this encourage you to make your Rapid Reclaim online?**
  - **Do you think it is quicker to do a Rapid Reclaim on the telephone or online?**

### *Exploring views on other ways to encourage JSA Online claims*

- 2.19** What do you feel would be the most effective way to encourage customers to use JSA Online rather than the telephone to make a new claim for Jobseekers Allowance?
- 2.20** I've got a couple of scenarios to get your views on. Firstly how would you feel if you rang up to make a claim for JSA by telephone, and were then given an appointment to ring you back to do the claim over phone in 3 days time?

- Would you be tempted to claim online or would you be happy to wait for the appointment?
- Explore pros/cons.

**2.21 Secondly, how would you feel if the only way to make a claim for JSA was online?**

- Explore views of if it was not possible to make a claim by telephone.
- Explore views on being able to book an appointment to use a computer at a Jobcentre, to make the claim online, if do not have access at home or at friend/family's home.)

*Exploring perceptions of online generally*

**2.21 How often do you use the internet?**

**2.22 Where do you tend to use the internet?**

- Home, work, library, friends' computer, internet café, community centres,
- PC, laptop or mobile smartphone?

**GO TO SECTION 3**

**2E. Claiming JSA over the telephone – telephony customers only, Trailblazer Two**

**2.1 When you rang the Jobcentre Plus JSA claims line, do you remember hearing a recorded message informing you of a 5 minute wait time?**

**2.2 Do you remember hearing a message asking you to go on line to make your JSA claim on our website at direct.gov.uk?**

**2.3 *If 2.2 is yes:* How did you feel about being asked to claim online? Probe: Were you surprised about being asked to claim online? Yes / No Why / Why not**

**2.4 If there was a ten minute waiting time on the phone, would you hold or claim online? How long would you be willing to wait before you'd give up and claim online?**

**2.5 Did you try to make your claim online? If so, why didn't you proceed? (Probe – were they ineligible to make a claim online, did they find the form difficult to complete, was there a particular stage / question in the form they gave up and why, etc)**

**2.6 Please could you tell me your reasons for making your claim by telephone? explore fully:**

- Problem with the JSA online claim form itself? **Have they ever tried to claim for JSA online previously?**
- Not eligible to make a claim using JSA Online
- Lack of IT/internet skills?

- No access to a computer?
- Low internet confidence? – wary of transacting digitally in complex matters?
- Prefer speaking face to face?

**2.7 Did you ever feel like complaining at any point during the claim process? If so at what point and why? Did you make a complaint? (do not probe but looking to see if they felt like complaining about being asked to claim online) Who did you make the complaint to?**

**2.8 How did you find the claim process on the telephone? What did you value? If that could be captured in the online claim process would you be tempted to claim online?**

**2.9 Can you see any advantages to claiming for JSA online? If so what are they? What advantages are there to claiming by telephone?**

**2.10 If a Rapid Reclaim customer –**

- As you know, claiming for a Rapid Reclaim takes less time than for a normal full claim. From what you know, do you think it would be quicker to do a Rapid Reclaim on the telephone or online?
- Is there anything that could be done to encourage you to make your Rapid Reclaim online next time?

### *Exploring views on other ways to encourage JSA Online claims*

**2.11 What could we do differently to encourage you to make any future JSA claims online? How can JSA Online be improved?**

**2.12 I've got a couple of scenarios to get your views on. Firstly how would you feel if you rang up to make a claim for JSA by telephone, and were then given an appointment to ring you back to do the claim over phone in 3 days time?**

- Would you be tempted to claim online or would you be happy to wait for the appointment?
- Explore pros/cons.

**2.13 Secondly, how would you feel if the only way to make a claim for JSA was online?**

- Explore views of if it was not possible to make a claim by telephone.
- Explore views on being able to book an appointment to use a computer at a Jobcentre, to make the claim online, if do not have access at home or at friend/family's home.)

### *Exploring perceptions of online generally*

**2.14 How often do you use the internet?**

**2.15 Where do you tend to use the internet?**

- Home, work, library, friends' computer, internet café, community centres,

- *PC, laptop or mobile smartphone?*

**2.16 Do you ever use the internet to make any other government transactions? (e.g. TV license, car tax) If so, what attracts you to make this/these transaction(s) online?**

### **3. Demographics**

**3.1 Which age category do you fall into?**

18-24      25-34      35-44      45-54      55+

**3.2 Record gender (do not ask) Male / Female**

**3.3 Do you have any long term illness, health problem or disability which limits your daily activities or the work you can do?**

1. Yes
2. No
- Don't know

**3.4 To which of these ethnic groups do you consider you belong? READ OUT**

A) White

1. British
2. Irish
3. Any other White background (Please Specify)

B) Mixed

1. White and Black Caribbean
2. White and Black African
3. White and Asian
4. Any other Mixed background (Please Specify)

C) Asian or British Asian

1. Indian
2. Pakistani
3. Bangladeshi
4. Any other Asian background (Please Specify)

D) Black or Black British

1. Caribbean
2. African
3. Any other Black background (Please Specify)

E) Chinese or other ethnic group

1. Chinese
2. Any other (Please Specify)

F) Refused

**Thank you for your time. Do you have anything else to add?**

# Annex E Analytical coding frameworks

In order to analyse the qualitative data, coding frameworks were developed for the staff and claimant interviews. The frameworks were strongly linked to the research questions to help ensure that the evaluation remained focused on the overarching evaluation aim. Each line of each interview transcript was labelled with one or more code from the relevant coding framework. Once all transcripts had been coded, tables were produced to collate all of the evidence relating to a particular code. These tables were then used as a basis to inform and structure the report writing.

## **E1 Staff Interviews Coding Framework**

### **1. Impacts on Job roles, workloads and resources**

- 1.1 Changes to roles and responsibilities (including none)
- 1.2 How staff persuade customers to go online
- 1.3 Views on the 8 options (Trailblazer One only)
- 1.4 Impacts on Contact Centres
- 1.5 Impacts on Jobcentres Impacts on Benefit Centres
- 1.6 Whether resources can cope with changes
- 1.7 Sustainability of changes if Trailblazer rolled out

### **2. Impacts on customer attitudes and complaints**

- 2.1 Whether formal complaints have been made / received
- 2.2 Customer reactions to being asked to claim online
- 2.3 Customer feedback in relation to the JSA Online claim form itself
- 2.4 Staff views on customer ability to use online
- 2.5 Staff reaction and ability to handle customer reactions to being asked to go online
- 2.6 Customer reactions to wait time (Trailblazer Two)
- 2.7 Customer reactions to being informed that online claims are prioritised over telephony claims (Trailblazer Three)

### **3. Staff knowledge and understanding of DWP Digital Agenda**

- 3.1 Understanding of DWP's Digital agenda, including 80 per cent ambition for JSA Claims Online, Universal Credit etc
- 3.2 Understanding of and training received on JSA Online
- 3.3 Understanding of and training / guidance received on Trailblazers

### **4. Staff attitudes towards encouraging customers to use JSA Online**

- 4.1 Positive reactions
- 4.2 Negative reactions

### **5. Issues and ideas**

- 5.1 Issues that emerged in the interview
- 5.2 Ideas on how the Trailblazers can be improved
- 5.3 Ideas on how JSA Online claim form and processing can be improved
- 5.4 Ideas on how to promote JSA Online and other DWP digital services
- 5.5 Views on whether the Trailblazer is increasing JSA Online use

Where no code is applied – not relevant to the study.

## **E2 Claimant Interviews Coding Frame**

### **1. Internet use and attitudes**

- 1.1 How often
- 1.2 Where and how (device)
- 1.3 Do they conduct other transactions online? (*note only non digital channel claimants were asked*)
- 1.4 Views/attitudes of the internet generally
- 1.5 Own assessment of skills and confidence in using the Internet / computers

### **2. What they did**

- 2.1 ONLINE Claimed online independently / straight away
- 2.2 ONLINE Initially rang telephony claims line / standard channels but then claimed online
- 2.3 NON DIGITAL CHANNELS Tried to claim online but didn't go through with it and claimed by standard channels
- 2.4 NON DIGITAL CHANNELS Didn't try to claim online and claimed by standard channels

### **3. Why they did - Perceptions, beliefs and attitudes towards claiming online / being asked or nudged to claim online**

- 3.1 How they heard about claiming online
- 3.2 Why they claimed online
- 3.3 Why they claimed by telephone (or other standard channels) or didn't claim online
- 3.4 Views of claiming online either now or in the future
- 3.5 Didn't realise you could claim online (found out during interview)
- 3.6 Views on being asked/nudged to claim online – e.g. positive and negative
- 3.7 Whether they remember the Contact Centre Agent asking them to claim online (Trailblazer 1)
- 3.8 Views on wait time – 5 minute, 10 minute etc (Trailblazer 2) and whether they remember being told about it
- 3.9 Views on prioritising of online claims (Trailblazer 3) and whether they remember being told about it
- 3.10 Views about the Helpdesk
- 3.11 Views of claiming by telephone or other standard channels

### **4. Experiences of using JSA Online**

- 4.1 Advantages of claiming online and positive experiences of using JSA Online
- 4.2 Disadvantages of claiming online and negative experiences of using JSA Online
- 4.3 Views of doing a Rapid Reclaim online / any notable findings in relation to making a Rapid Reclaim online
- 4.4 Required support to complete form using JSA Online
- 4.5 Where they accessed JSA Online from
- 4.6 How long it took to claim online
- 4.7 How JSA Online could be improved

- 4.8 How quick it was to get a decision / hear next steps
- 4.9 No real views whether positive or negative experience / Neutral experiences of JSA Online
- 4.10 Whether they felt like complaining during the claim / form process

## **5. Hypothetical views of scenarios**

- 5.1 Views of scenario 1
- 5.2 Views of scenario 2

## **6. Future behaviours**

- 6.1 Views on how to encourage themselves or others to use JSA Online
- 6.2 Whether or not they will claim online next time
- 6.3 Whether they would recommend it to family / friends

Where no code is applied – not relevant to the study