



## Research report

# Agent Dedicated Line and Agent Account Manager Pilot Evaluation

Delivering a better service to Agents

**Business Customer Units**

**Her Majesty's Revenue and Customs Research Report Number 119**

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

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## ADL/AAM Evaluation

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

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

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

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## ADL/AAM Evaluation

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

HMRC is committed to improving the experience of all its customers via a wide range of initiatives. Two specific initiatives are currently being trialled:

- An Agent Dedicated Line (ADL) which routes calls to more experienced operators and includes a structured escalation to technicians. Trial ADL test centres are located in East Kilbride and Bradford.
- Agent Account Managers (AAMs) who are dedicated customer relationship managers. Two AAMs were trialled, one in Ipswich, the other in Edinburgh/ Scotland. Agents were invited to participate in the pilot via the Working Together forums. Most were keen to do so.

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

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

### ***When the research took place***

The research took place from 5<sup>th</sup> February to 21<sup>st</sup> March 2008.

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ADL/AAM Evaluation

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

Interviews were conducted amongst both ADL/AAM users, and HMRC staff. A combination of qualitative and quantitative methods were used. The following qualitative interviews were conducted:

<b>Qualitative Interviews (mix of face to face and telephone)</b>				
<b>Agent Managers</b>	<b>Account</b>	<b>1 – Edinburgh</b>	<b>1 – Ipswich</b>	<b>5 Feb/ 19 Feb</b>
<b>Agent</b>		<b>9 – Edinburgh</b>	<b>9 - Ipswich</b>	<b>19 Feb – 21 March</b>
<b>HMRC Staff</b>		<b>9 - East Kilbride</b>	<b>9 - Bradford</b>	

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The following quantitative interviews were conducted. A ‘control’ cell of callers to APL - the Agent Priority Line (the previous service for Agents), was conducted to assess the incremental improvement of the ADL. Contacts were provided by the HMRC ADL or APL staff.

<b>Survey (telephone)</b>			
<b>East Kilbride</b>	<b>ADL callers</b>	<b>175</b>	<b>3 March – 21 March</b>
<b>Bradford</b>	<b>ADL callers</b>	<b>175</b>	
<b>Sunderland (control cell)</b>	<b>APL callers</b>	<b>150</b>	
<b>Total</b>		<b>500</b>	

Data tools used included Net Promoter Score – a standard method of assessing customer satisfaction, and key drivers analysis, which identifies the factors which most strongly correlate with overall call satisfaction.

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## ADL/AAM Evaluation

### *Main Findings: ADL*

#### **Staff Views About ADL**

Calls from agents have been easier since ADL, since they seem to be happier and are therefore more pleasant to deal with. Other than this, staff reported that the ADL has little effect on the day to day role of contact centre staff.

Many staff believe that ADL staff should have more than 12 months experience, and ideally a minimum of two to three years should be set.

Staff reported that calls from agents can be handled more quickly, and are much more professional and businesslike, though HMRC staff say some agents can be difficult, and especially dislike the security questions.

Some staff especially prefer calls from agents, and would be happy to specialise further, while others actively dislike these calls. This depends on how 'businesslike' the staff member likes to be on calls.

Some staff have ethical concerns over prioritising agents, though these are a minority.

Staff feel that ADL tier 2 (escalated calls) is over-resourced, and these staff under-utilised.

#### **Agents' Usage and Awareness of ADL / APL**

Nine in ten callers to ADL or APL were aware before the call that they were phoning a dedicated agent line. However there is currently low (5%) spontaneous awareness of the ADL name, and many thought they called APL. Awareness of ADL rises to 30% after prompting.

Most agents sampled are calling the lines very regularly – typically at least once a day, if not several times a day.

#### **Call Waiting Period**

Eight in ten agents claim to get through to ADL or APL on first attempt. HMRC data shows this is actually 99%.

#### **Overall Call Satisfaction**

There is evidence that satisfaction with ADL is higher than APL (6.5 out of 9, compared to 6.2 – a statistically significant different at 95% confidence level). Performance of the two pilot locations (East Kilbride and Bradford) are identical.

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## ADL/AAM Evaluation

Calls involving escalation to tier 2 technicians have lower satisfaction, but this may be because those calls are the more complex cases, and less likely to be resolved to the agent's satisfaction.

### Key Drivers of Satisfaction

The top three drivers of overall satisfaction relate to the quality of the advisor's response:

1. Clear communication
2. Providing accurate information
3. Knowledge about specific query

Agents' also consider speed to be an important factor. Making efforts to resolve problems and disputes quickly and speed of getting through to speak to someone are elements that drive satisfaction in agents.

Less important to overall satisfaction is specialist expertise, flexibility and the way the agent is treated and respected. This confirms that the expectations of agents are a purely businesslike transaction.

### Satisfaction with Specific Aspects of the Call

The top driver of satisfaction – clear communication – was better on ADL than APL. ADL is also better at saving agent time, as calls are answered more quickly and problems resolved faster.

### Net Promoter Score

The net promoter score is based on the following question: *'how likely or unlikely would you be to recommend this specific phone service to other agents? On a scale of 0-10, where 0 is not at all likely, and 10 is very likely'*

The 'net' score is then calculated by the % rating 9 or 10 minus the % rating 0-6.

ADL's score is +52%. This compares relatively well to benchmarks, for example RBS at +15%, Virgin Mobile at 67% and Waitrose +73%.

### Agents' Views on ADL

As stated earlier, awareness is relatively low currently. However those who have used the service are very positive, in terms of it being easier to get through. There is a perception that the staff are a little more knowledgeable, but knowledge is 'hit and miss' and could be improved further.

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## ADL/AAM Evaluation

### *Main Findings: AAM*

#### **Agent Frustrations with HMRC Generally**

Agents are frustrated by the apparent inefficiencies in processing, and the lack of knowledge of some contact centre staff. There is a desire by some for the reintroduction of smaller scale tax offices, even though they realise this is not feasible. Online services, especially email are perceived to be lacking, and could considerably improve efficiency.

#### **The Role of the AAM**

The AAM represents a major improvement in service provision over the status quo.

Both agents and AAMs agree that the AAM role is:

- Facilitator
- Trouble shooter
- Point of referral
- Dealing with complex issues beyond standard channel usage
- Analysing problems and trends to feed back internally
- Educational role

Additionally, Agents would like the role to include:

- A proactive, personalised and speedy service with one contact
- Providing extensive help beyond processing issues
- Immediate assistance

#### **Benefits of the AAM Role**

Agents are very supportive of the role, and understand the nature of it well. They believe it is an efficient way of servicing their needs and will lead to improvements in efficiencies within HMRC too.

The AAMs themselves value the potential benefits to the HMRC system too, and believe that both parties save time, energy and patience.

#### **Barriers to the AAM Role**

Some agents question the amount of influence the AAM can genuinely make over the HMRC system. Some feel a greater priority should be better use of online systems.

AAMs themselves too feel the need for better support within the wider organisation. Lack of support is largely based on lack of awareness, but partly driven by those internally who do not feel agents should get priority treatment.

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## **ADL/AAM Evaluation**

### **Time Efficiencies**

Agents involved in the pilot have generally not 'misused' the AAM service, and have only used it when necessary, and not in place of contact centres. Many agents spoke of issues which would have taken 90 minutes or more in a contact centre being resolved in 5 minutes by an AAM. However quantifying time saved is very difficult. The best estimate is a 30 minute to 2 hour time saving, once a month. The cost of this time is average £75 per hour.

### **Improving the AAM Role**

Awareness is the key issue, from both AAM and Agent perspectives.

### **Ideal Candidates for AAMs**

When thinking about what types of staff should be AAMs, agents cite personality as more important than experience. Candidates need to be personable, patient, reliable, determined and empathetic, with technical and business knowledge too. But they don't need to know everything. AAMs themselves believe a Higher Officer grade is required to carry the necessary clout in the organisation.