



HM Revenue and Customs Contact Centres

Customer Research 2008/2009

Submitted to

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1 Executive Summary

1.1 Background

Contact Centres (CC) represent a key part of HM Revenue and Customs' (HMRC) commitment to serve its customers in a modern, efficient and professional manner across a number of channels. HMRC commissioned ORC International in 2005 to conduct customer satisfaction research for the Contact Centres.

Eight HMRC helplines are included in this research and in total over 7,500 interviews were completed between March 2008 and February 2009.

The research aimed to evaluate how customers viewed the service provided by the Contact Centre and gave them an opportunity to provide constructive feedback on the level of service received and to help inform service improvements.

1.2 Findings

1.2.1 Reasons for calling

We asked respondents a series of questions about the nature of the call they had made to the specific helpline over the last month.

The results reflect that just over one third (36%) of contact with HMRC was unprompted from HMRC; as the respondent needed help with a query, this was the most common reason for seeking help from HMRC. This was the primary reason for individuals contacting the Employers (75%), National Advice Service (NAS) (60%), Construction Industry Scheme (CIS) (51%), Taxes helplines (43%), Self-employed (39%) and Online Services (34%).

The second most common reason was to inform HMRC of a change in circumstance (29%). This was the primary reason for Tax Credits (43%) and Child Benefits (42%).

- Thirty six percent of contact was initiated by respondents themselves and not pre-empted by HMRC, 29% contacted to notify HMRC of a change in circumstances and 16% called to get help about a letter that was sent by HMRC.
- Nearly nine in ten respondents (87%) called on their own behalf, 8% called on behalf of another person, 2% on behalf of a business they owned or directed and 3% on behalf of an employer. The overwhelming majority of Tax Credits (96%), Child Benefit (94%) and Self-employed respondents (93%) called on behalf of themselves. Unsurprisingly, the Employer helpline was more likely to be called by respondents on behalf of another person or a client than any of the other

helplines. Finally those calling the CIS are more likely to call on behalf of the business they work for compared to any other helpline.

- The majority of respondents found the telephone number to contact on a letter, form or other source of information sent out by HMRC (62%). The majority also stated that they found it very easy to get the right telephone number to call (74%). This was higher amongst Tax Credits callers (81%). Ninety three percent of callers found the number either very easy or fairly easy to find.

1.2.2 Internet and HMRC Website

To understand the potential to extend the use of online services, we asked respondents a series of questions about their access to the Internet and perceptions of the HMRC website:

- Eighty two percent of respondents had access to the Internet. This includes 96% of NAS, CIS callers, and Employee helpline callers, 89% of Self-employed Contact Centre callers, 83% of Taxes callers, 76% of Child Benefits callers and 78% of Tax Credits callers.
- Almost a third of respondents felt that they would be able to get the necessary help or information they needed from the Revenue and Customs website (29%). This was higher amongst callers to the CIS helpline and lower amongst those calling the Online helpline (40% and 22% respectively).
- Of the 61% of respondents who reported that they had visited the Revenue and Customs website, 67% overall stated that they were satisfied with it (19% being 'very satisfied'), whilst 14% stated that they were dissatisfied. This top box satisfaction figure compares with ORC's Public Sector benchmark figure of 75%¹. Most Employer (88%), NAS (83%) and CIS (82%) callers had visited the website compared with fewer Self-employed (64%), Taxes (65%), Tax Credits (53%) and Child Benefit (43%) callers. Satisfaction was broadly consistent across the helplines.

1.2.3 Initial contact

We asked respondents a series of questions about the initial or first contact they initiated with the specific HMRC Helpline to resolve their issue/query:

¹ This is the current ORC International public sector benchmark produced from the customer research data of nearly 70 central government departments and agencies. The benchmarking report for the benchmarked service aspects is included in the appendix.

- Overall, 83% stated that they were satisfied with the time it took to get through to a member of staff.
- High proportions of respondents felt that the staff member listened to what they had to say (08/09, 95%), understood the reason for their call (08/09, 94%), and asked appropriate questions to understand their enquiry (08/09, 94%).
- Seventy six percent of all respondents stated that they got the information that they needed at the first attempt.
- The majority of calls (74%) were dealt with by the first member of staff spoken to, 16% of calls were transferred, 15% were given the number of someone else to call, 13% were told that someone would call them back and a further 5% were advised to look on the website. More queries to the CIS, Child Benefit and Tax Credits helpline were dealt with by the first member of staff (90%, 87%, and 88% respectively) compared with queries to the Online Services and Taxes lines (74% and 77% respectively).

1.2.4 Enquiries requiring further contact

Those respondents whose query was not successful at the first point of contact or not dealt with by the first person they spoke to were asked a series of additional questions about the resolution of their query:

- All those whose call was not dealt with by the first person they spoke to were asked whether they were given a reason as to why they could not be helped there and then. Overall, 72% of respondents stated that they were given a reason why they could not be helped immediately. There was some variation between the different helplines. One in eight callers to the Employers helpline and Online Service (78%) were given a reason; this was higher than the Tax Credits (67%) and Child Benefits helpline (60%).
- The 918 respondents who were given a reason why they were not helped at the first point of contact were asked how satisfied they were with the explanation given, and two thirds were satisfied.
- All respondents who were transferred were asked how acceptable they thought this was. Overall, just 14% said that being transferred was not at all acceptable. More businesses than non-business callers thought that it was very acceptable to be transferred (50% and 41% respectively).

1.2.5 Expected speed of response

In order to understand the context of the customer experience, we asked respondents about their perceptions of the nature of their query in terms of its complexity and expectations regarding the speed of response from the HMRC helpline:

- Overall, 88% of respondents stated that they felt their query was either very or fairly simple, with 44% of respondents stating that they expected their query to be dealt with immediately. High proportions of CIS (72%), Employer (67%) and NAS (60%) callers expected their query to be resolved immediately compared with less than half of Online (44%), Child Benefit (42%), Taxes (42%) and Tax Credits (41%) callers.
- When respondents' expectation of how quickly their query should be answered was compared with the perceived complexity of their query, it is unsurprising that the speed at which the majority of respondents expect their query to be dealt with slows as the difficulty/complexity of the query increases. However, expectations were still high, with 21% with a self-defined very complex query stating that they expected this to be resolved immediately.

1.2.6 Staff

We asked respondents a series of questions about the call handling skills of the member of staff who dealt with their call:

- High proportions of respondents were satisfied with the ease of understanding the call (08/09, 91%), the usefulness of response (08/09, 87%), and the time taken to provide advice or information (08/09, 90%).
- Respondents were asked to think about the way in which the person who dealt with their call handled their query. There were very high levels of satisfaction on all counts. There was also, a consistent service provided across all the helplines.
 - 99% agreed the staff member spoke clearly
 - 97% believed the staff member behaved in a professional manner
 - 97% agreed the staff member was polite
 - 93% agreed that they were helpful
 - 91% felt that the staff member was confident in dealing with their enquiry

- These high levels of satisfaction compare favourably with the ORC Public Sector Benchmark figures of: 94% for politeness, 91% for helpfulness, 93% for professional conduct.
- Just 4% of respondents thought that the person they spoke to was too formal, 2% felt they were too informal and 94% thought the manner was about right.
- Overall, 92% of respondents stated that they were satisfied with the way the call was handled by the member of staff.
- 94% of respondents felt that the action they should take following the call was made clear to them and 89% felt that the action HMRC would take was made clear.

1.3 Overall Satisfaction

- Sixty seven percent of respondents who had contacted the helpline more than once in the previous month felt that they received a consistent service.
- Satisfaction with the overall service received from the helplines was high at 87%; in line with the current ORC Public Sector benchmark of 87%². Satisfaction levels across the different helplines were as follows:
 - 96% of callers to the Employers helpline stated that they were satisfied
 - 93% of NAS respondents were satisfied
 - 86% of Taxes respondents were satisfied
 - 85% of Tax Credits respondents were satisfied
 - 86% of Child Benefit respondents were satisfied
 - 93% of CIS respondents were satisfied
 - 94% of Self-employed Contact Centre respondents were satisfied
 - 84% of Online Services helpline respondents were satisfied
- Suggestions for service improvements focused on time taken to answer the phone, better trained/knowledgeable staff and more phone lines. It is noteworthy though that almost half of respondents stated that no improvements were needed, a good service was received (47%).

² Comparison with the previous year should be taken as indicative of trend and may not represent a 'real' change.

1.4 Conclusions

- Overall, services are very positively received, and satisfaction is ahead of the ORC Public Sector Benchmark figure in many areas. Key positive take-outs from this survey:
 - Most respondents find it easy to get through to the helplines
 - The majority of calls are dealt with at the first attempt and by the first person that they speak to
 - Staff deliver to high standards, and customers have a high regard for the staff they encounter
 - Most repeat customers find that they receive a consistent service from HMRC
 - Eight of the nine helplines have overall satisfaction at or above the ORC benchmark level
- Analysis of the results shows the importance of the success at the first attempt, and ensuring that as many as possible get a resolution to their query when they contact HMRC. Whilst the most common reason for contact was customers seeking unprompted help from HMRC, a fifth of customers had contacted HMRC either to chase progress on a previous query or seeking help about something that they had been sent by HMRC which they did not understand. These types of contact are not likely to be eliminated completely but may be able to be minimised by ensuring that customers are clearly explained timescales of their enquiry and ensuring correspondence is as easy to understand as possible.
- Callers to the CIS, Employers and NAS helpines all had high expectations of solving their queries quickly. However, only CIS respondents had relatively high proportions who described their query as very simple, with Employers and NAS lines having relatively low percentages that thought it was very simple. These findings are problematic for these two customer lines as they show very high expectations that due to the complexity of their contact will prove challenging to meet
- One possible way to minimise burden of contact to the Contact Centres is to capitalise on the high incidence of internet access and visits to the HMRC website by Employer, NAS and CIS respondents. Another possible area to minimise burden would be for Self-employed Contact Centre callers, who have a comparatively high level of belief that they could have solved their query through the website but a low level of actually having accessed the website previously.

Targeted initiatives to the customers of these four helplines could be introduced to market and drive online services amongst these callers.

- Also targeted at the website³ is the relatively low levels of satisfaction with it (compared with the ORC benchmark) amongst respondents overall which may be undermining confidence in the ability that they could solve the simple queries that most are coming to HMRC for.

Annex A Methodology

³ Website satisfaction is asked of callers who have used the website. Satisfaction with the website is consistent across the lines, so the comparatively low level of satisfaction is not due to a skew from the online services helpline, who could have been expected to be less satisfied given that they are likely to be calling with regard a problem they are having with this service.

A ten minute telephone questionnaire was designed by ORC International in conjunction with HMRC. Due to the wide range of customers, the questionnaire aimed to examine generic customer service measures, though routing allowed for some specificity dependent on customer type and business line.

Data was collected through a rolling monthly survey conducted over the course of a year. Sample was provided weekly for two weeks per month, so respondents were interviewed the week immediately following their call to the Contact Centre. The sample was loaded in two batches each month into the ORC International CATI system to ensure that all callers were recent contacts of a helpline and would have clear memory of their call. Interviews were conducted between March 2008 and February 2009.

Quotas were placed for each helpline as shown in the table below. The quotas were determined on the basis of the number of calls received by the helpline. The overall results were weighted by call volumes for each helpline but comparisons between helplines were left unweighted.

Table 1.1 Target interviews

	Target interviews per month	Annual Target	Annual total number of interviews
Tax credits	120	1440	1455
Taxes	120	1440	1452
NAS	80	960	969
Employers	60	720	736
Self-Employed	60	720	723
CIS	60	720	725
Child Benefit	60	720	727
Online Services	60	720	727
Total consolidated	620	7440	7514

