



HM Revenue and Customs Contact Centres

Customer Research 2009/2010

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. ORC International has conducted customer satisfaction research for the Contact Centres since 2005. The research evaluated how customers viewed the service provided by the Contact Centre, giving customers the opportunity to provide constructive feedback on the level of service received and helping to inform service improvements.

Eight helplines were included in the research and in total over the annual rolling survey more than 7,500 interviews were completed between March 2009 and February 2010.

1.2 Findings

1.2.1 Reasons for contact

- The most common reasons for contacting HMRC were unprompted contact as a result of needing help with a query (34%), informing HMRC of a change in circumstance (32%), to get help about a letter sent by HMRC (15%) and to chase progress (10%). These reasons suggest that further reviews could be carried out into providing more online facilities for updating details, ensuring that external customer communications are as easy to understand as possible and that customer interaction time-frames are understood.
- 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. 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, and those calling the Construction Industry Scheme (CIS) line were more likely to have called on behalf of the business they worked for compared to any other helpline¹.

¹ Comparisons across helplines should be treated as indicative only, and may not represent a 'real' difference in service.

- The majority of respondents found the telephone number to contact on a letter, form or other source of information sent out by HMRC (60%), and almost all found it very or fairly easy to find the right telephone number to call (95%).

1.2.2 Internet and HMRC Website

There appeared to be the potential to extend the use of online services amongst Contact Centre customers:

- Eighty four percent of respondents had access to the Internet and it was high across all helplines (it ranged from 80% to 97%).
- Almost three in ten respondents (27%) felt that they would be able to get the necessary help or information they needed from the Revenue and Customs website. This was higher amongst callers to the CIS helpline, but lower amongst those calling the Online Services helpline (46% and 19% respectively).
- Two thirds of respondents stated that they had visited the HMRC website; this was higher amongst the business lines such as the Employer (92%), National Advice Service (NAS) (87%) and CIS (83%) lines.
- Seventy percent of those respondents who reported visiting the HMRC website were satisfied with the website (19% being 'very satisfied'), and 13% said that they were dissatisfied. Satisfaction was broadly consistent across the helplines. The overall top box satisfaction figure was lower than ORC's Public Sector benchmark figure of 77%².

1.2.3 Initial contact

- Overall, 85% stated that they were satisfied with the time it took to get through to a member of staff; this was slightly higher than the ORC benchmark of 82%.
- High proportions of respondents felt that the staff member listened to them (09/10 95%), understood the reason for their call (09/10 95%), and asked appropriate questions to understand their enquiry (09/10 94%).

² This is the current ORC International public sector benchmark. The benchmarking database has compiled data from other customer research surveys from more than 50 central government departments and agencies. The questions in the Contact Centre survey are where possible compared with the benchmark. The benchmark is the median figure amongst the organisations for each particular question topic, for example, overall satisfaction with the service.

- Seventy six percent of all respondents stated that they received the information needed at the first attempt. There were differences across helplines, Online Services (66%), Taxes (68%) and Child Benefit (74%) callers were slightly less likely to have had success at the first point of contact. More than four in five (81% to 88%) callers to the other helplines had success at the first attempt.
- The majority of the calls (86%) were dealt with by the first member of staff spoken to, 12% of calls were transferred, 7% were given the number of someone else to call, 8% were told that someone would call them back and a further 5% were advised to look on the website.

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 immediately. Overall, 73% of respondents stated that they were given a reason why they could not be helped without delay. There appeared to be some variation between lines, with callers to the Employers (76%), Taxes (75%) and Online Services (74%) all more likely than the CIS helpline (63%) to be given a reason.
- The 775 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. Sixty percent of respondents overall stated that they were satisfied (either very satisfied or satisfied).
- All respondents who were transferred were asked how acceptable they thought this was. There was generally a level of understanding with being transferred; only 13% said that being transferred was not at all acceptable.

1.2.5 Expected speed of response

- Overall, 87% of respondents stated that they felt their query was either very or fairly simple, with 39% of respondents stating that they expected their query to be dealt with immediately. High proportions of CIS (70%), Employer (63%) and NAS (57%) callers expected their query to be resolved immediately compared with less than half of Online Services (46%), Child Benefit (35%), Taxes (36%) and Tax credits (36%) callers.

- Respondents' perception of the complexity of a query related to the speed the majority of customers expected their query to be dealt with. However, 22% of those who believed their query to be very complex still expected it to be resolved immediately.

1.2.6 Staff

- High proportions of respondents were satisfied with the ease of understanding the call (09/10 91%), the usefulness of response (09/10 86%), and the time taken to provide advice or information (09/10 88%).
- It was felt that the member of staff that handled their query spoke clearly (99%), behaved in a professional manner (98%), was polite (97%), helpful and was confident in dealing with the enquiry (92%). This performance was repeated across all the helplines and compared favourably with the ORC Public Sector benchmark.
- Overall, 93% of respondents stated that they were satisfied with the way the call was handled by the member of staff.
- Almost all respondents (95%) felt that the action they should take following the call was made clear to them and 91% felt that the action HMRC would take was made clear.

1.3 Overall Satisfaction

- Seventy 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 88%; in line with the current ORC Public Sector benchmark of 84%. Satisfaction levels across the different helplines were as follows:
 - 95% of Self Employed Contact Centre (SECC) respondents stated that they were satisfied
 - 92% of Employers helpline respondents were satisfied
 - 91% of CIS respondents were satisfied
 - 91% of Tax Credits respondents were satisfied
 - 90% of NAS respondents were satisfied
 - 84% of Child Benefit respondents were satisfied

- 83% of Taxes respondents were satisfied
- 83% of Online Services Helpline respondents were satisfied
- Suggestions for service improvements focused on time taken to answer the phone/providing more phone lines and having better trained/knowledgeable staff. It is noteworthy though that half of all respondents stated that no improvements were needed as a good service was received (49%).

1.4 Conclusions

Overall, services continued to be positively received, and performed better than other public sector organisations (determined through comparison with ORC Public Sector benchmarks).

Whilst most respondents were satisfied with the time taken to get through to the helplines, it was slightly discouraging that 20% of callers were *not* able to get through on the first attempt. Previous research on behalf of HMRC by ORC showed that many customers of the face-to-face channels had turned to this channel because they were unable to get through to the Contact Centres. It is, therefore, important that customers are able to get through to the Contact Centres when they try to, and customers' queries are successfully dealt with.

It will continue to be important that enquiries are dealt with at the first attempt, and ensuring that as far as possible, customers receive a resolution when they contact HMRC. The 2009/10 survey showed that success in this area had an impact in terms of customer satisfaction.

Although customer contact was generally unprompted, a substantial proportion of customers were contacting because they had not received a response or they had received information from HMRC that they did not understand. Generally, HMRC would benefit from reviewing their publications and communication strategy and ensuring that customers are clear about what is expected of them, and clear of timescales of response from HMRC.

Callers to the CIS, Employers and NAS helplines all had high expectations of solving their queries quickly. However, only CIS respondents had relatively high proportions who described their query as very simple. These findings together are problematic for Employers and NAS as they show very high expectations that due to the complexity of their contact will prove challenging to meet.

In order to minimise burden of contact to the Contact Centres it is important that the high incidence of internet access and experience of the HMRC

website amongst callers to the business helplines is capitalised upon. Moving customers to online channels could also help to ensure that these types of customers receive the speed of service that they expect.

Annex A Methodology

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 2009 and February 2010.

Quotas were placed for each helpline as shown in the table below (Table 1.1). 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 achieved interviews
Tax Credits	120	1440	1452
Taxes	120	1440	1450
NAS	80	960	962
Employers	60	720	724
Self-Employed	60	720	721
CIS	60	720	736
Child Benefit	60	720	737
Online Services	60	720	724
Overall	620	7440	7506

