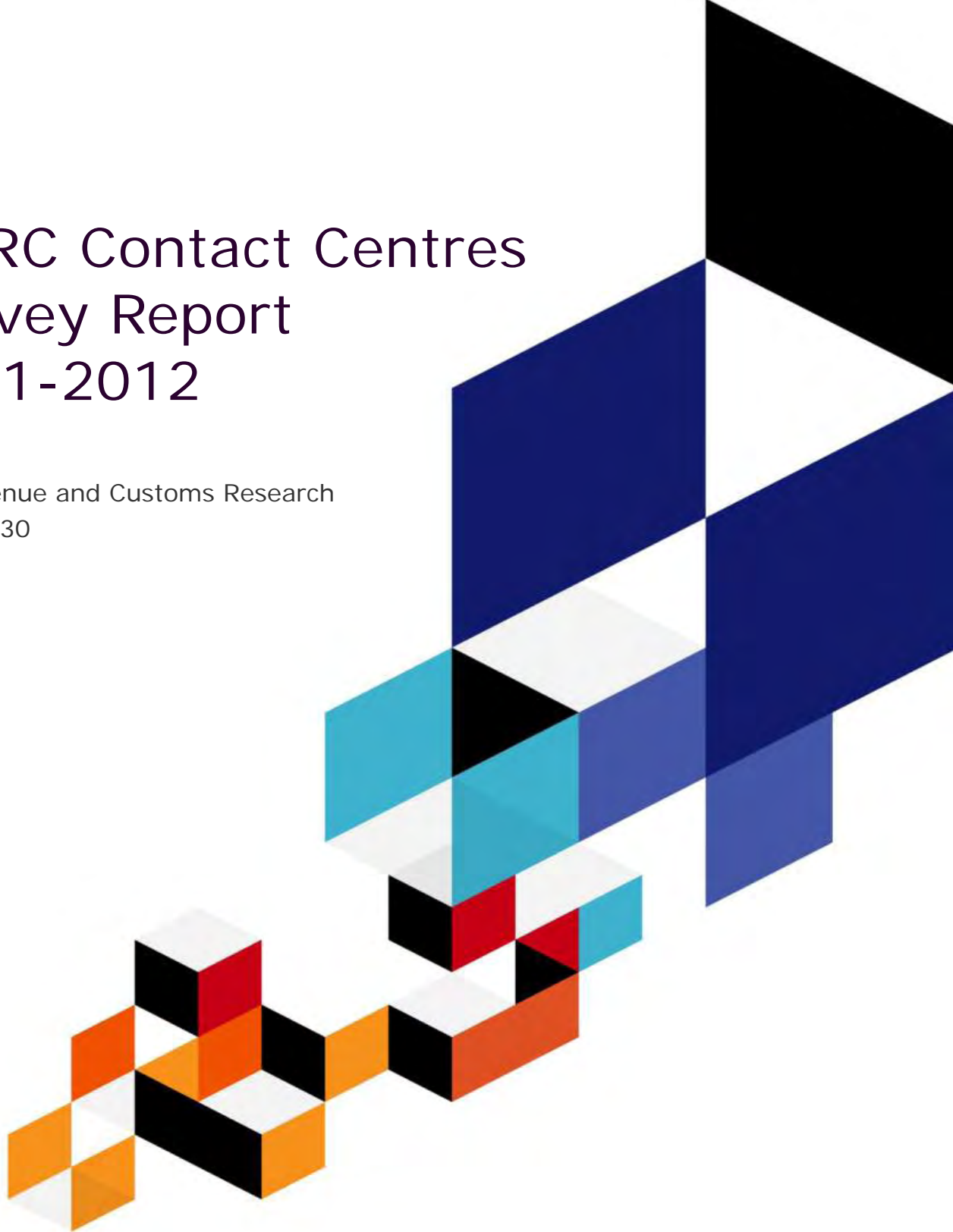


HMRC Contact Centres Survey Report 2011-2012

HM Revenue and Customs Research
Report 230



TNS BMRB



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Executive summary

HMRC Contact Centres provide a national telephone service for dealing with enquiries from HMRC customers. The main aim of this research project is to measure the experience of customers using the contact centres, in order to allow HMRC to better understand their customers' needs and work to improve their overall experience.

The survey started in October 2010 and covers all lines of business and contact centres. This report covers the results for the April 2011 to March 2012; results from October 2011 to March 2012 have been compared to results from October 2010 to March 2011 where possible.

Overall customer experience

Overall, scores were very positive:

- Overall experience was rated as very good or fairly good by 82% of customers.
- Experience of calling the helpline was in line with expectations for half of all customers (52%), and better than expected for a third of customers (35%).

Key Driver Analysis (KDA) revealed that to improve the overall experience score further, ease of getting in touch and getting things right the first time were key areas for improvement.

Ease of getting in touch

Most respondents only had to call once to get through to an adviser (67%).

The call waiting time was on average 4 minutes 30 seconds (median), although a third of customers (32%) reported waiting over 10 minutes. Reported waiting times have increased year-on-year.

Two-thirds (66%) said that it was very or fairly easy to get in touch with the helpline. This was found to vary according to the amount of time customers had to wait before speaking to an adviser; 35% of those who waited more than 10 minutes said that they found it easy to make contact.

Looking at the results by business groups, customers who phoned Business Tax helplines waited less time on average to get through than others (a median time of two minutes thirty), and customers of the Personal Tax helplines were least likely to say it was very or fairly easy to get in touch (61%).

First contact resolution

Just over two-thirds (69%) reported talking to an adviser once about their issue and a fifth (22%) said they had spoken to advisers two or three times.

Four-fifths (82%) said that the number of times they spoke to an adviser about the issue was acceptable. This score varied according to the number of times customers had spoken to an adviser:

- 94% of those who spoke to an adviser once found this acceptable
- 67% of those who spoke to an adviser two or three times thought it was acceptable
- 26% of those who spoke to an adviser four or more times thought it was acceptable

Advisers

Customers were generally very positive towards advisers:

- 94% felt the adviser had treated them well
- 91% agreed that the adviser had understood their query
- 88% said it was easy to understand the information provided by the adviser
- 87% agreed that the adviser had sufficient expertise to deal with their query
- 86% said it was easy to understand what they had to do next to resolve their query

Improvements

A third of customers felt that no improvements were needed (36%).

The most common suggestions respondents spontaneously gave for improvements were:

- Improve the time taken to get through to an adviser (35%)
- Have better trained / more knowledgeable staff (14%)

The KDA results reinforce the improvements spontaneously given by respondents. Ease of getting in touch was an area highlighted as needing improvement in the KDA and the top improvement given spontaneously was to improve the time taken to get through to a member of staff.

Similarly, getting things right the first time was an area which the KDA suggested should be focused on for improvements. This is likely to be related to the levels of training and knowledge of staff which was the improvement 14% of respondents spontaneously said they wanted to see. This result does conflict slightly with the KDA, as the KDA also showed that most respondents felt that advisers had the right level of expertise, however, it was only a minority (14%) that said this area should be improved.

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1. Introduction

1.1 Background and survey aims

HMRC Contact Centres provide a national telephone service for dealing with enquiries from HMRC customers. HMRC Contact Centres operate over 17 sites in the UK and deliver 16 dedicated customer helplines. Every year approximately 60 million calls are received by the Department from people who are seeking help or information about their tax affairs or entitlement to tax credits and benefits. As contact centres are at the frontline of HMRC service delivery, their work is key to the Department's vision of improved customer experience.

The main aim of this research project is to measure the experience of customers using the contact centres, in order to allow HMRC to better understand their customers' needs and work to improve their overall experience.

1.2 Methodology

The target population for this survey consisted of customers who had phoned a HMRC helpline. Sample was collected by the helpline advisers in 200 randomly selected one hour slots, and then transferred to TNS BMRB every fortnight. Records were randomly selected for interview and were then loaded into the telephone interviewing software. Interviews were conducted with each batch of sample for up to two weeks, to ensure that customers were interviewed while their experience was fresh in their minds. New sample was loaded into the system every fortnight.

Over the twelve month period there were 141,476 calls made to contact centres during the timeslots selected for sampling. Out of these calls 135,038 customers (95% capture rate) were asked to take part and 62,359 of customers agreed to participate in the survey (46% participation rate). Of these, 9,048 were randomly selected for the survey. 16% of these customers could not be contacted because the number recorded for them was incorrect, so that the effective survey sample was 7,612.

In total, 4,404 interviews were conducted between March 2011 and April 2012 and the response rate, based on the effective sample, was 58%.

Table 1 : Survey outcomes

	Number	Percentage (total)	Percentage (effective total)
Total sample issued	9,048	100%	N/A
Bad sample / wrong number	1,436	16%	N/A
Total effective sample	7,612	84%	100%
Total interviews conducted	4,404	49%	58%
Refusals	1,035	11%	14%
No contacts	2,173	24%	29%

The sample was weighted to compensate for variation in sampling probabilities and to remove design bias. Further calibrations were applied based on call volume data provided by HMRC to ensure that each helpline group was represented proportionately.

1.3 Coverage of the report

This report covers the survey findings for the 2011 to 2012 financial year and covers all lines of business and contact centres. Where possible, this report compares the 2011 to 2012 results with the previous results. In order to avoid seasonality effects, the results are compared year on year: the October 2011 to March 2012 results are compared with the October 2010 to March 2011 results.

For the purpose of this report when referring to the overall sample this includes all sites and lines of business that were sampled. For all questions results have been examined by the three main business groups, which categorise different lines of business handled by the helplines.

Benefits and Credits refers to:

- Tax Credits
- Tax Credits Debt Management and Banking (TC DMB)
- Child Benefit

Personal Taxes refers to:

- Taxes
- Online Services Helpdesk (OSH)
- Construction Industry Scheme (CIS)
- Orderline
- Employers helpline
- All National Insurance helplines

Business Tax refers to:

- VAT and VAT Online
- Excise
- Stamps
- Electronic Customer (ECS)

Furthermore, for the key measures results are reported separately for the five lines of business where sufficient interviews were achieved over the year for individual analysis; Tax Credits, Taxes, Child Benefit, OSH and National Insurance.

1.4 Significant differences

In reporting of the results, tests have been carried out for statistical significance to ensure that the differences highlighted are *real* differences and not differences that might be observed because a sample was surveyed, rather than the whole population. For the purposes of this report, any differences commented on were found to be significant at the 95% confidence level.

The design effects caused by the weighting and the clustering of the sample collection (caused by only collecting sample during specific timeslots) were calculated and used when checking the results for significance.

1.5 Sample profile

The following tables show the weighted and unweighted profile of the sample.

Table 2 : Sample profile – Line of business

	Unweighted		Weighted
	Count	%	%
Tax credits	1775	40%	44%
Taxes	1591	36%	31%
Child Benefit	277	6%	7%
National Insurance (NI)	237	5%	6%
Online Services Helpdesk (OSH)	184	4%	4%
Employers Helpline	85	2%	2%
Construction Industry Scheme (CIS)	83	2%	2%
VAT & VAT Online	73	2%	2%
Orderline	31	1%	1%
VAT & Excise*	30	1%	1%
Tax Credits Debt Management and Banking (TC DMB)	10	0%	0%
Excise	9	0%	0%
Taxes Debt Management and Banking (Taxes DMB)*	7	0%	0%
Stamps	6	0%	0%
Construction Trust Fund (CTF)	4	0%	0%
Debit card	2	0%	0%

*As of July 2011 these helplines no longer exist

Table 3 : Sample profile – Site

	Unweighted		Weighted
	Count	%	%
Bathgate	511	12%	12%
Longbenton	417	9%	10%
Peterlee	396	9%	9%
Newcastle	386	9%	9%
Dundee	374	8%	10%
Cardiff	352	8%	9%
East Kilbride	306	7%	6%
Liverpool	268	6%	6%
Bradford	206	5%	4%
Sunderland	203	5%	4%
Lilyhall	193	4%	4%
Manchester	171	4%	3%
St Austell	171	4%	4%
Merry Hill	160	4%	4%
Glasgow	112	3%	3%
Portsmouth	91	2%	2%
Belfast	87	2%	2%

Table 4 : Sample profile – Type of caller

	Unweighted		Weighted
	Count	%	%
Individual	4247	96%	96%
Agent	59	1%	1%
Business	98	2%	2%

Further details on the demographic breakdown of individuals who contacted the helplines and the nature of the calls made to the helplines have been appended.

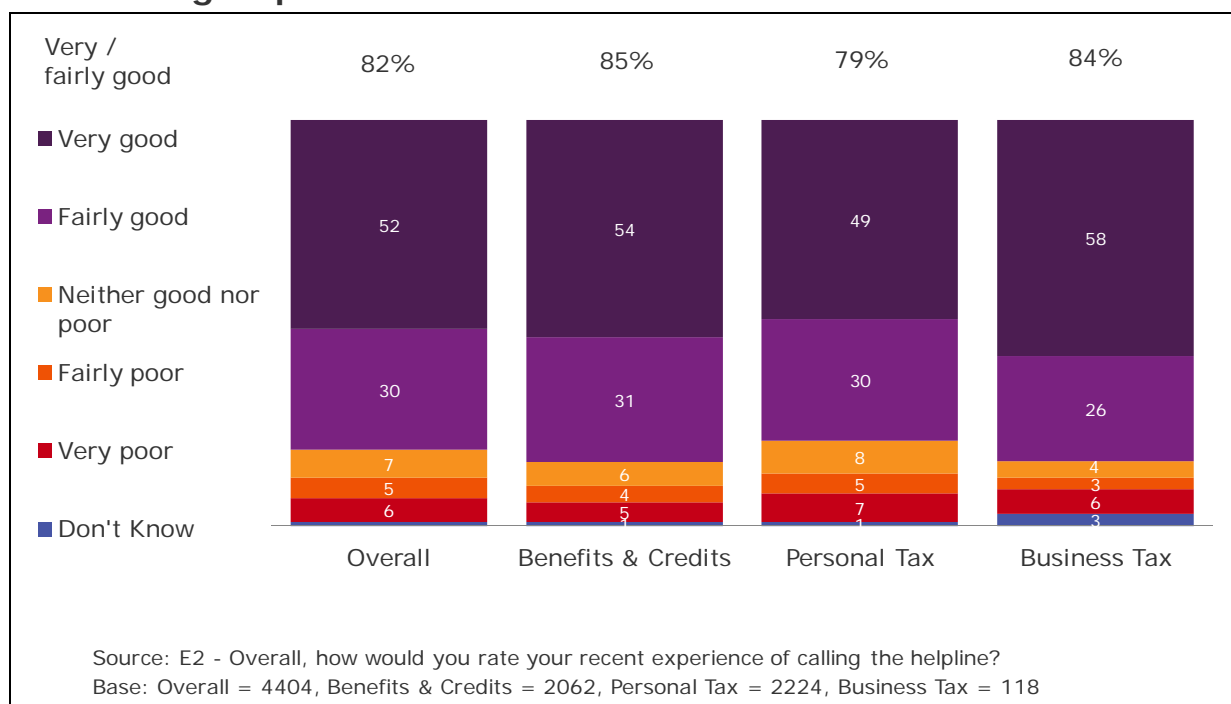
2. Customer experience

2.1 Overall rating of the experience of calling the helpline

2.1.1 Total and trend results

Customers were asked, putting aside the outcome of the call, to rate their experience of calling the helpline using a five point scale ranging from very good to very poor. Customer sentiment was largely positive, 82% of respondents gave an answer of either very good or fairly good to this question. Customer satisfaction has remained consistently high over time, with 82% of respondents interviewed in both October 2010 - March 2011 and October 2011 - March 2012 rating their experience as either very or fairly good.

Chart 5 Overall rating of recent experience - across the three main business groups



2.1.2 Sub-group analysis

Whilst largely positive, there were slight differences between the three main business groups. Customers calling the Benefits and Credits helplines had the most positive experience, with 85% rating their

experience as very or fairly good, significantly greater than those calling the Personal Tax helpline (79%).

Differences were also found across the five main helplines. The Child Benefit helpline achieved the highest level of customer satisfaction in this area, with 90% rating their experience as very good or good, significantly higher than the two lowest performing lines of business, Taxes and OSH, which were rated as very good or good by 77% at this question.

As stated above, the Personal Tax helplines generally scored lower than the Benefits and Credits helplines; the only exception to this was NI which 86% of respondents rated as very or fairly good, putting it on a par with the Personal Tax helplines.

Table 6 Overall experience - across five main lines of business

Helpline	Base	% very / fairly good recent experience of calling the helpline
Child Benefit	277	90%
NI	237	86%
Tax Credits	1,775	84%
Taxes	1,591	77%
OSH	184	77%

2.1.3 Factors contributing to customer experience

There were a number of questions which were positively correlated with customer experience scores.

Ease of getting in touch with a helpline adviser was highly correlated, with 93% of those selecting very or fairly easy at this question having a good experience calling the helpline, compared with overall figures of 82%. The number of times customers had to speak to an adviser about the issue also had a significant impact, with 92% of those who found this very or fairly acceptable rating their overall experience as either very good or good, once again, significantly higher than the overall figures of 82%.

How good or poor the helpline adviser was at getting things right the first time was a key factor. Nearly all (92%) respondents who rated the helpline very good or good at getting things right the first time gave a positive answer in relation to their overall experience.

Finally, ease of understanding what to do next to resolve the query also played a role in the customer experience, with those rating this as easy being significantly more likely to have a positive experience of calling the helpline (88%).

Table 7 Groups with high experience ratings

	Base	% very / fairly good recent experience of calling the helpline
Overall sample	4,404	82%
Very/fairly easy to get in touch with the helpline	2,854	93%
Very/fairly acceptable the number of times had to speak to an adviser	1,795	92%
Very/fairly good at getting things right the first time	3,434	92%
Very/fairly easy to understand what to do next	3,769	88%

2.1.4 Key Driver Analysis

2.1.4.1 Methodology

In the previous section correlations between different variables and overall experience of calling the helpline were examined, however a drawback with this standard bi-variate analysis approach is that other factors that may be underlying the differences seen between two groups cannot be controlled for. Multivariate regression analysis can circumnavigate this problem. It allows for multiple variables to be included in the model at the same time and therefore can measure the change in overall experience when only one variable is changed and all others are held constant.

This analysis is based on six months of data (October 2011 – March 2012) as a new question¹ was added to the survey in October 2011 and this was felt to be an important question to include in the modelling. Key Driver Analysis was carried out using multivariate analysis of the overall rating of the respondents' experience of calling the helpline. This analysis produced a list of drivers together with an indication of their relative importance to respondents in terms of their overall experience.

The final analysis plots importance against performance for each of the drivers in a quadrant diagram. The relative importance of each driver - an output from the regression which shows the importance to respondents in terms of their overall experience - is plotted on the horizontal axis. The performance score for each driver is plotted on the vertical axis and is based on the percentage of respondents that gave a positive answer to the question within the survey.

This plot is then divided into four with lines at the median importance and performance scores. The key area in this diagram is the quadrant to the bottom right – issues in this quadrant are those of high customer importance but low perceived performance, relative to the other issues. Drivers in this quadrant should be the main focus for improvement to improve overall experience. Those in the bottom left are issues of relatively low performance, but also lower importance, and are therefore issues for secondary improvement. The top right quadrant contains issues

¹ Question D1b which asks respondents how acceptable the number of times they had to speak to an adviser about the issue was.

of high importance, but also of higher performance relative to other issues and these are issues that need to be maintained in order to keep ratings high.

Red shading is used in the bottom right quadrant to signify key areas for improvement, amber shading for secondary areas for improvement in the bottom left and green shading for areas to maintain in the top right and to a lesser extent in the top left.

R^2 , also known as the coefficient of determination, is the proportion of variability in the data that is explained by the regression model. An R^2 of 1 indicates that the regression line perfectly fits the data, whereas a 0 indicates that the regression model does not explain the data at all. For this model the R^2 statistic was found to be 0.6, this means that 60% of the variance is explained by the model, this is a very good result for cross-sectional survey data.

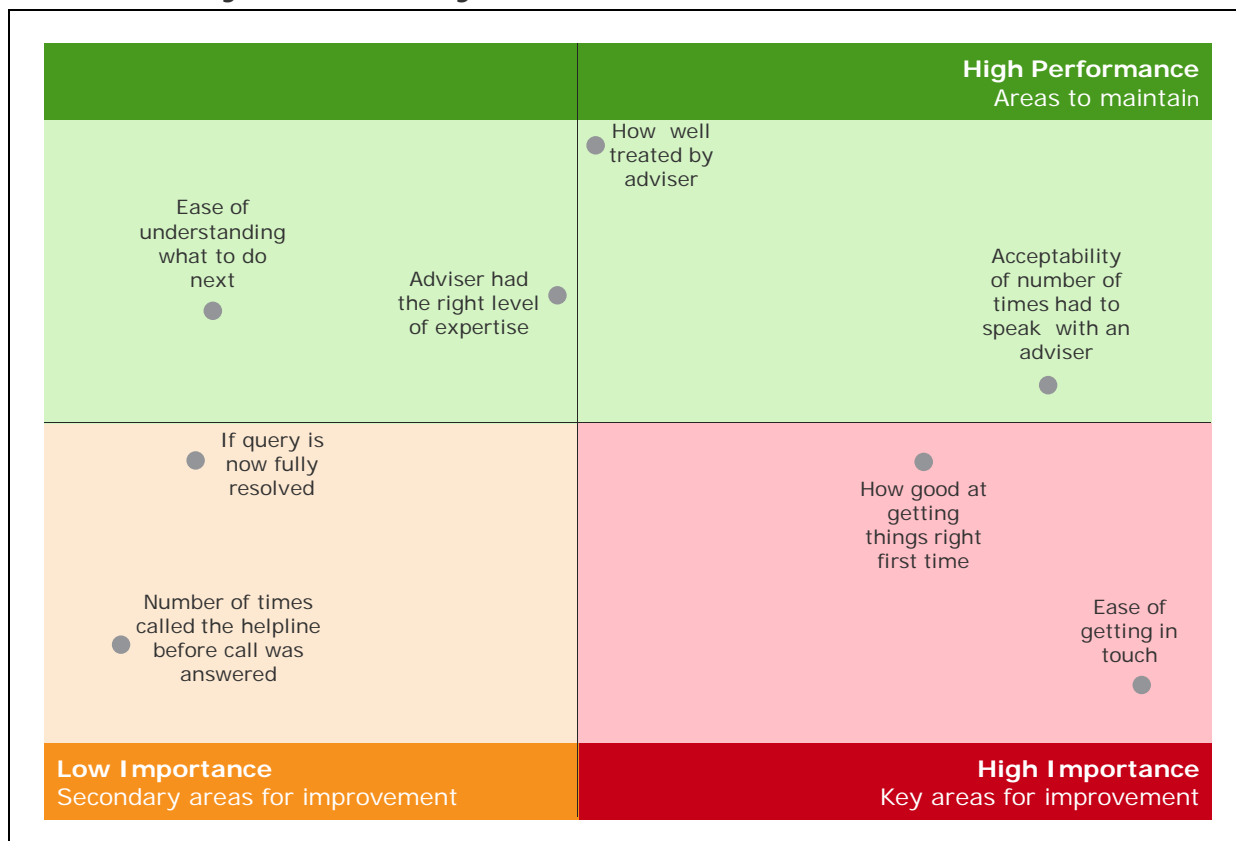
2.1.4.2 Findings

Table 8 shows all of the customer experience measures ranked in order of influence on the overall experience. This was generated from the first iteration of the Key Driver Analysis. Issues that were strongly correlated or had very low influence were then removed and the analysis was re-run. The final results of the analysis are shown in the quadrant chart that follows.

Table 8 Influence of different factors on overall experience

Customer Experience	β
Acceptability of number of times had to speak with an adviser	0.188
Ease of getting in touch	0.184
How good at getting things right first time	0.170
How well treated by adviser	0.116
Adviser had the right level of expertise	0.104
If query is now fully resolved	0.060
Ease of understanding what to do next	0.053
Number of times called helpline before call was answered	0.049
Length of time waiting on phone before spoke with an adviser	0.034
Ease of understanding information provided by adviser	0.025
Agreement that adviser understood the query	0.016

Chart 9 Key Driver Analysis Quadrant



R²=0.60

The Key Driver Analysis revealed that there are a couple of areas of high importance which could perform better: ease of getting in touch and getting things right the first time. These two issues are key areas for improvement.

Performance scores were high in the acceptability of the number of times customers had to speak with an adviser and how well customers felt advisers treated them, and need to be maintained to keep the overall experience rating high.

Secondary areas for improvement are reducing the number of times customers have to call the helpline to get their call answered and making sure that queries are fully resolved, where performance is relatively poorer but the importance of these factors to overall experience is lower.

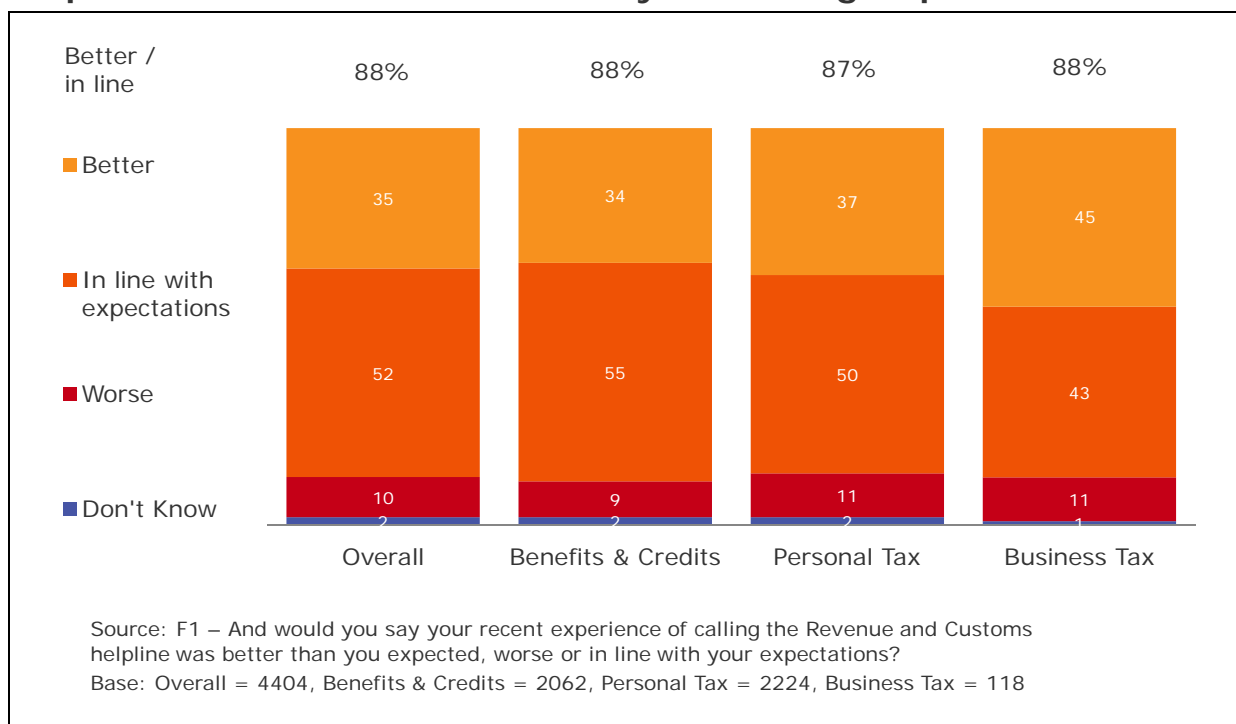
2.2 Experience of calling the helpline compared with expectations

2.2.1 Total and trend results

Customers were also asked whether their experience of calling the helpline was better, worse or in line with their expectations. Overall, a large proportion of customers rated their experience of calling the helpline as either better (35%), or in line with their expectations (52%).

Over time, there has been a slight but significant decrease. Whilst 90% of customers interviewed between October 2010 and March 2011 found the experience better or in line with their expectations, this fell to 87% between October 2011 and March 2012.

Chart 10 Experience of calling the helpline compared with expectations - across the three key business groups



2.2.2 Sub-group analysis

Results were found to vary somewhat by business group; customers who contacted the Business Tax helplines were more likely to say their experience was better than expected (45%) than Benefit and Credit helpline customers (34%). The proportion of customers who found the experience worse than expected was similar across the three business groups.

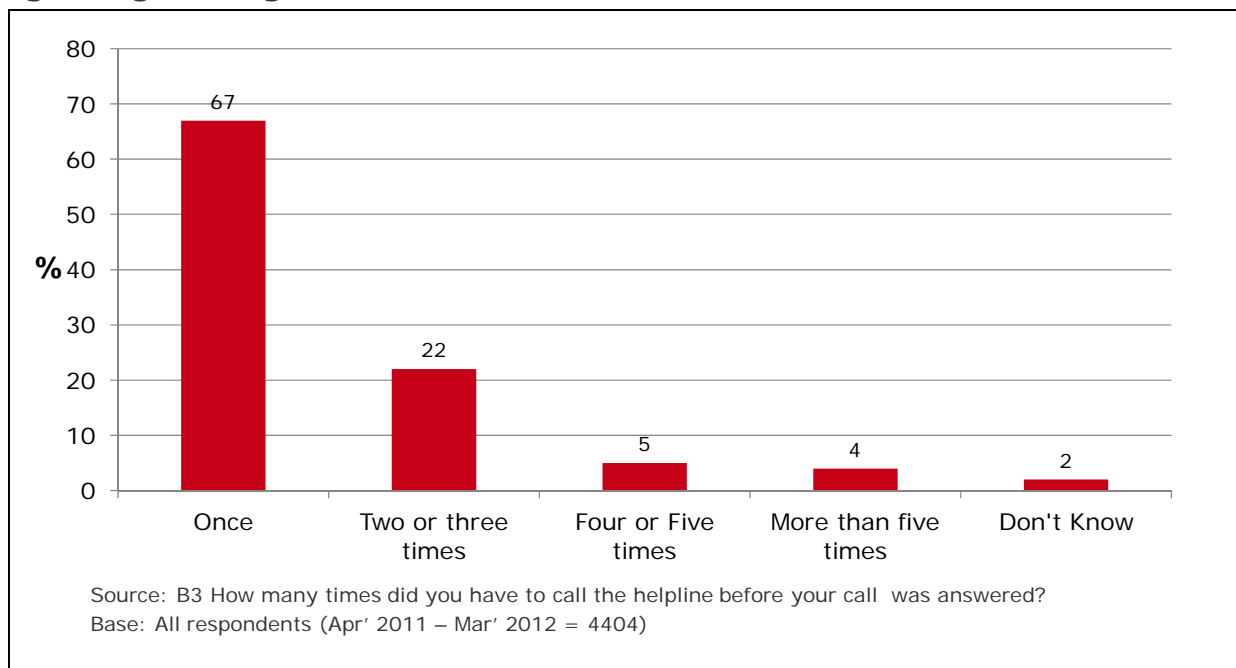
3. Getting in touch with the helpline

3.1 Number of times customers called the helpline before being able to speak to an adviser

3.1.1 Total and trend results

Customers were asked a series of questions relating to how easy or difficult they found it to get in touch with the helpline. The first question required respondents to identify how many times they had to call the helpline before their call was answered. The results revealed that two-thirds (67%) of respondents had called just once and a fifth (22%) had to telephone two or three times before their call was answered.

Chart 11 Number of times customers called the helpline before getting through – overall results

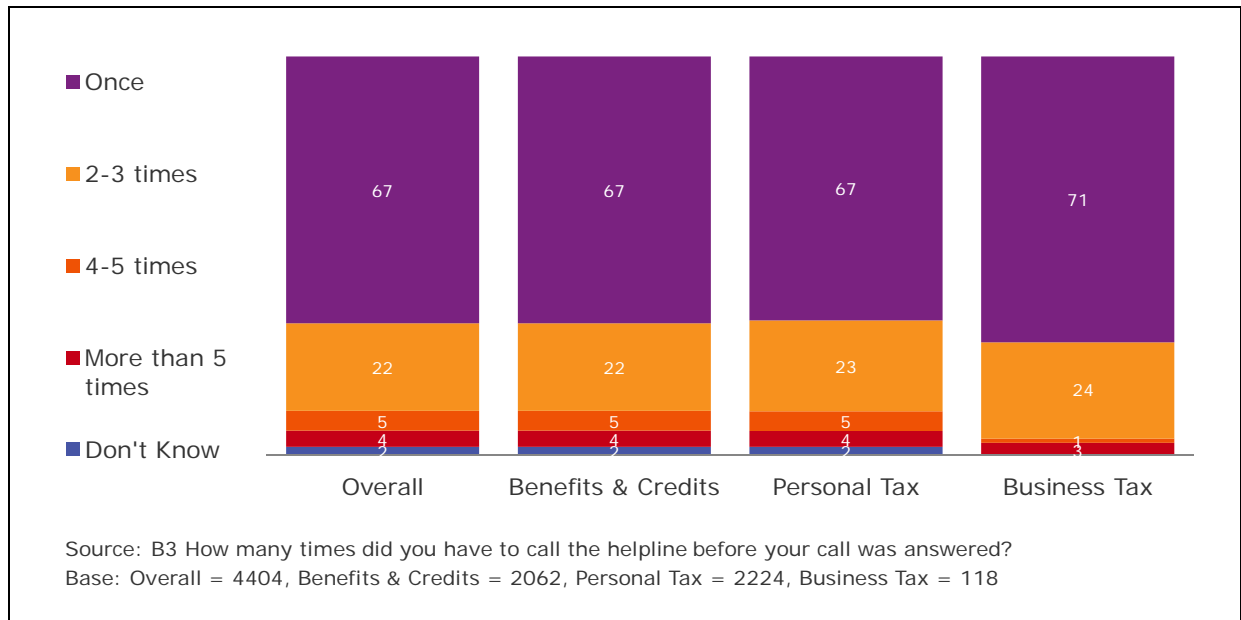


Analysis was also undertaken to identify how much results had changed over time; results were found to be consistent across each six month period, with no significant changes.

3.1.2 Sub-group analysis

There was also very little variability across each of the three main business groups. No significant differences were observed.

Chart 12 Number of times customers called the helpline before getting through - across the three key business groups



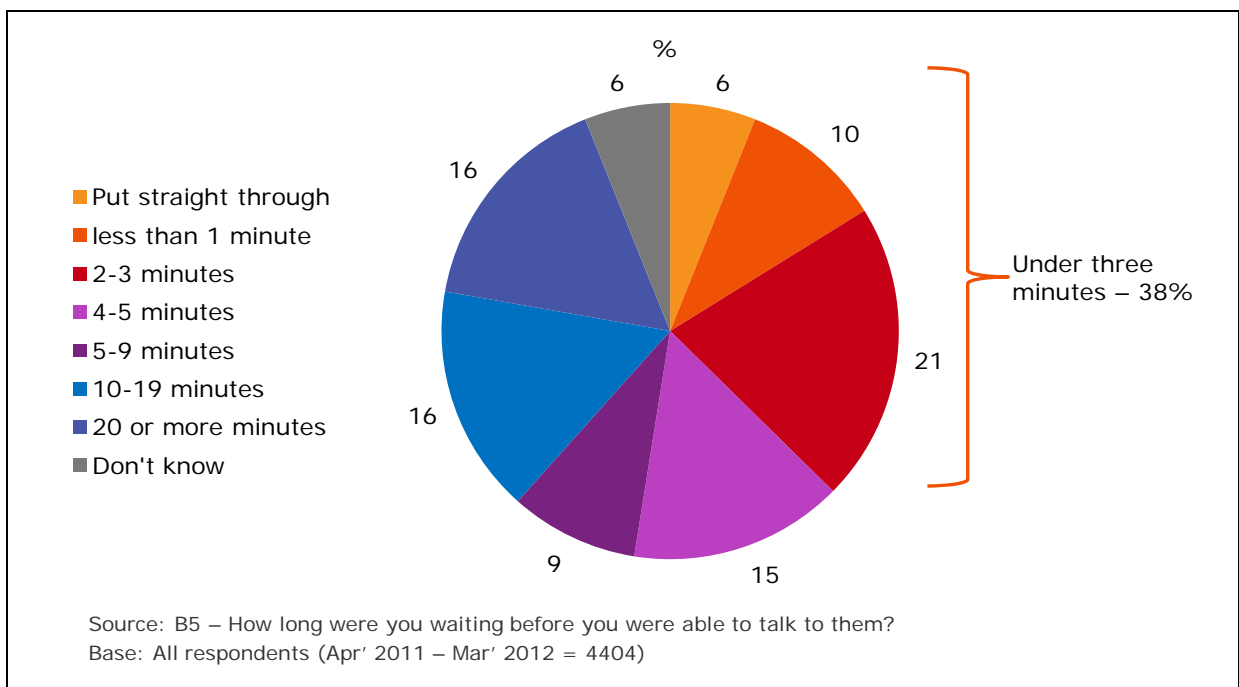
3.2 Call waiting times

3.2.1 Total and trend results

Respondents were asked to state how long they had to wait before being put through to a helpline adviser. Two-fifths (38%) reported waiting under three minutes, a quarter (24%) between four and nine minutes and a third (32%) over ten minutes. The median waiting time was found to be 4 minutes 30 seconds.

Looking at results over time, 49% reported waiting less than three minutes between October 2010 and March 2011, however, between October 2011 and March 2012 this had decreased significantly (42%). This is also reflected in the median waiting times, between October 2010 and March 2011 this was two and a half minutes and between October 2011 and March 2012 it was four and a half minutes.

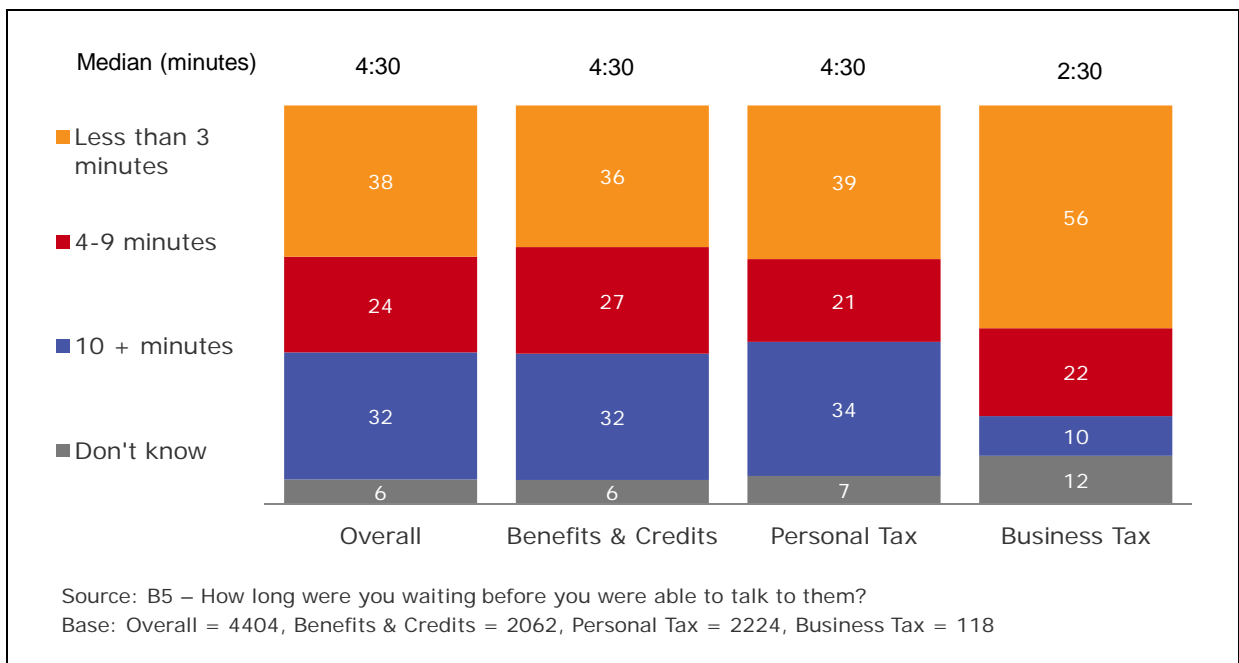
Chart 13 Time waited on the phone before speaking to an adviser – overall results



3.2.2 Sub-group analysis

Differences in call waiting time were also analysed across the three main business groups. The Business Tax helplines had a significantly shorter waiting time than the Personal Tax and Benefits and Credits helplines. Waiting times for the Benefits and Credits and Personal Tax helplines were very similar, with median waiting times of four and a half minutes.

Chart 14 Time waited on the phone before speaking to an adviser – across the three main business areas



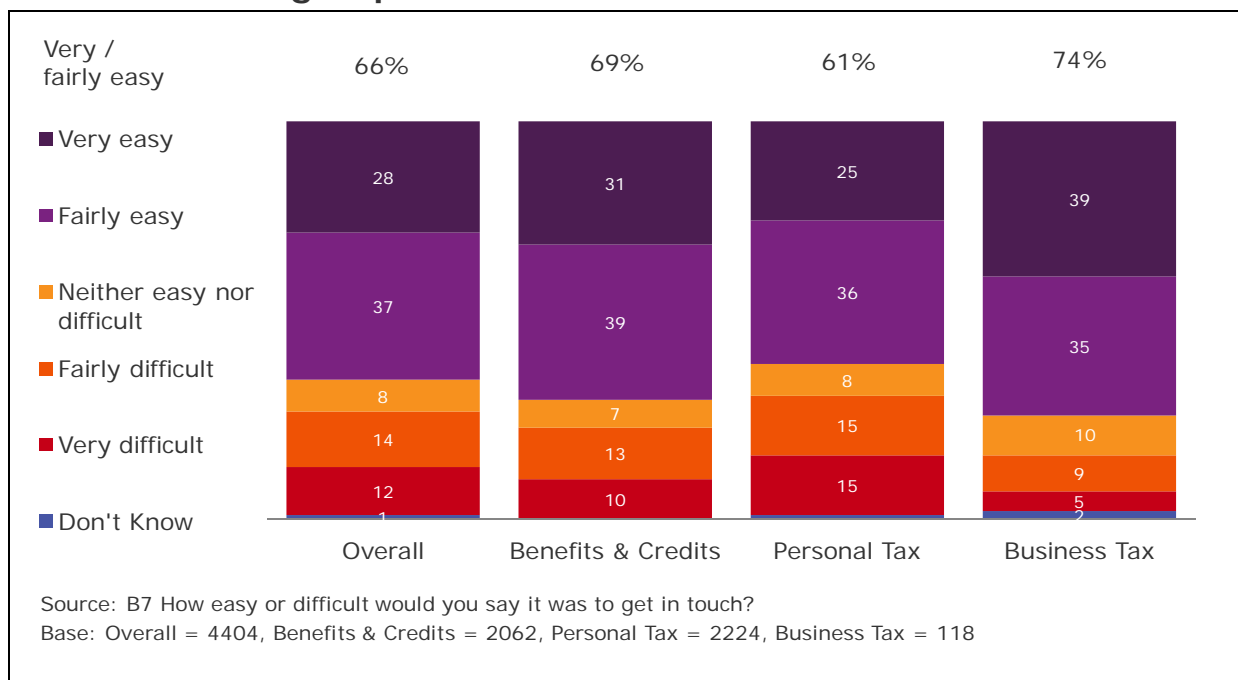
3.3 Overall ease of getting in touch with the helpline

3.3.1 Total and trend results

Customers were asked to rate how easy or difficult they felt it was overall to get in touch with the helpline, on a five point scale ranging from very easy to very difficult. Overall results for the last year were positive, with two-thirds (66%) finding it very or fairly easy.

Results have not changed significantly over time, 69% of those respondents surveyed between October 2010 and March 2011 rated their ease of getting in touch as very or fairly easy, compared with 67% of those questioned between October 2011 and March 2012.

Chart 15 Ease of getting in touch – overall and across the three main business groups



3.3.2 Sub-group analysis

There were significant differences across the three main business groups. Personal tax customers found it significantly less easy to get in touch with the helpline than Benefits and Credits and Business Tax helpline customers.

The scores for the different business groups were found to have changed over time. Firstly, Benefits and Credits customers were more likely to have said it was very or fairly easy to get in touch between October 2011

and March 2012 (76%), than between October 2010 and March 2011 (69%), a significant improvement. The Personal Tax helplines however saw a significant decrease in ease of getting in touch over time, with 68% of customers asked between October 2010 and March 2011 rating this as very or fairly easy, compared with 60% of customers between October 2011 and March 2012.

Differences were also observed across the five main helplines. Child Benefit and NI were rated the easiest to contact and these results were significantly higher than for Taxes and OSH.

Table 16 Ease of getting in touch – five main lines of business

Helpline	Base	% very / fairly easy to get in touch
Child Benefit	277	81%
NI	237	77%
Tax Credits	1,775	68%
Taxes	1,591	57%
OSH	184	57%

3.3.3 Factors contributing to ease/difficulty of getting in touch

As shown in Table 17, a range of different factors were identified as contributing to customers' perceived ease or difficulty of getting in touch with the helpline.

Respondents with a call waiting time of less than three minutes were significantly more likely to find it easy to get in touch with the helpline (89% compared to the overall figure of 66%). This was significantly greater than those waiting either four to nine (68%) or ten or more minutes (35%).

Those customers who made one call before it was answered were also significantly more likely to rate getting in touch as very or fairly easy, with 80% of one call customers selecting this response. This contrasts sharply to those customers who had to call the helpline four times or more, with just 18% of these callers finding it easy to get in touch.

Those who spoke to an adviser once about the issue were also more likely to have said they found it very or fairly easy to get in touch (72%) than those who spoke to an adviser more than once.

Table 17 Groups that found it easiest to get in touch with the helpline

	Base	% very/fairly easy to get in touch with the helpline
Overall sample	4,404	66%
Call waiting time less than three minutes	1,660	89%
Experience calling the helpline better than expectations	1,568	82%
Answered on first call	2,946	80%
Spoke only once to helpline adviser about the issue	3,000	72%

4. First contact resolution

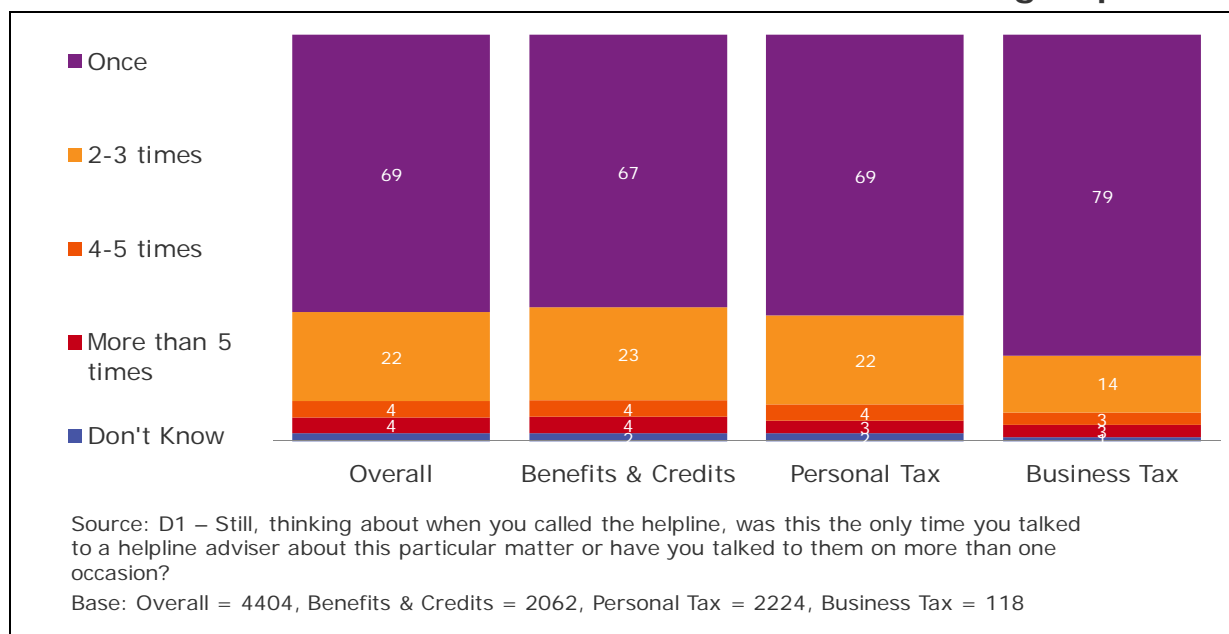
4.1 Number of times the customer had to speak to an adviser about the issue

4.1.1 Total and trend results

Respondents were asked how many times they had spoken to a helpline adviser about the issue they were phoning about when asked to participate in the survey. The majority of customers said they had spoken just once about their issue (69%) and a fifth (22%) had spoken to an adviser two or three times.

Year-on-year there was no change at this question, 68% of customers surveyed between October 2010 and March 2011 spoke to an adviser once and 67% for October 2011 to March 2012.

Chart 18 The number of times spoken to a helpline adviser about the issue – overall and across the three main business groups



4.1.2 Sub-group analysis

79% of the Business Tax helplines customers reported calling just once, compared with 69% of Personal Tax customers and 67% of Benefits and Credits customers, a significant difference.

4.2 Whether the query was fully resolved

4.2.1 Total and trend results

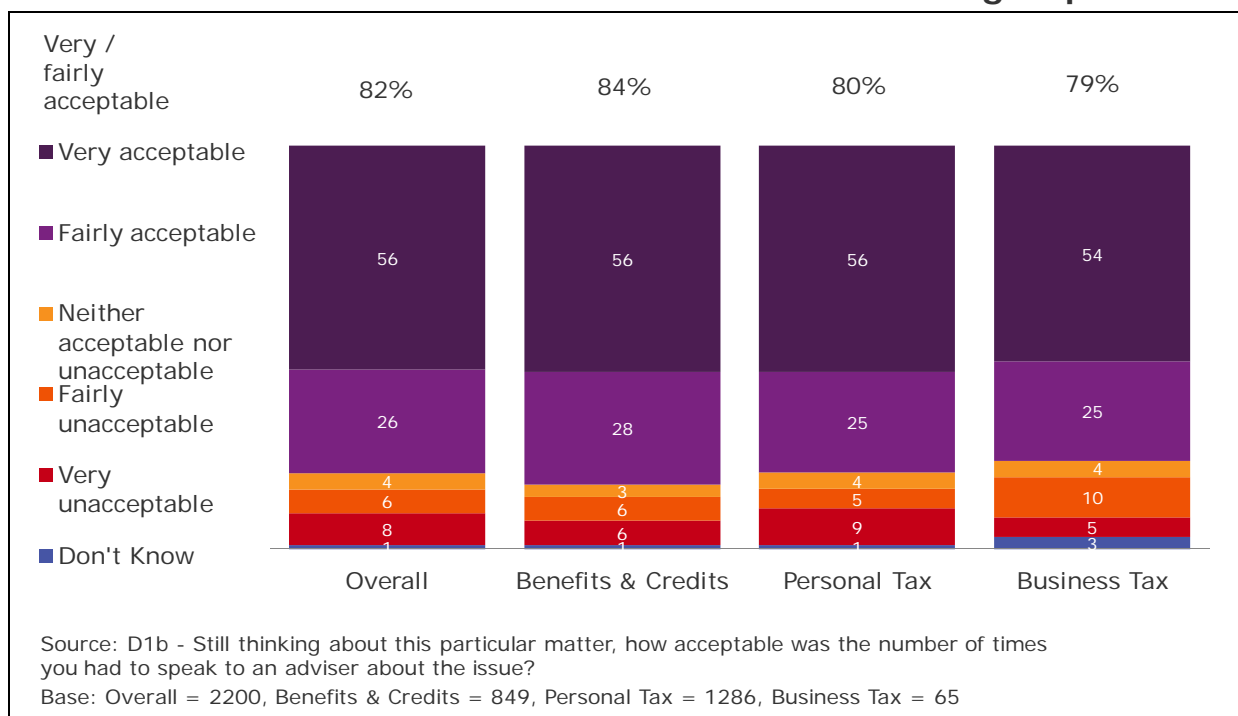
Customers were asked whether or not their query had now been resolved. The vast majority of customers said their query was fully resolved (79%). There has been no significant change over the past 12 months at this question.

4.3 Acceptability of the number of times customers spoke to an adviser about the issue

4.3.1 Total results

Respondents were required to rate how acceptable they felt the number of times they had to speak to an adviser about the issue was. Responses revealed a positive attitude to this area of the helpline, with 82% of respondents rating this either very or fairly acceptable. Trend data is not available for this question, as this question was added to the survey in October 2011.

Chart 19 Acceptability of number of times had to speak to an adviser – overall and across the three main business groups



4.3.2 Sub-group analysis

Responses were very consistent for this question across the three main business areas. Interestingly, the Benefits and Credits helpline yielded the highest acceptability score (significantly higher than Personal Tax), despite this group of helplines having the lowest proportion of customers speaking just once to an adviser.

Caution must be taken when looking at the Business Tax helpline results as the sample size is low.

There were no significant differences in how acceptable customers felt the number of times they had to speak to an adviser about the issue was across each of the five main helplines.

4.3.3 What is an acceptable number of times to speak to an adviser?

Nearly all (94%) customers who spoke to an adviser only once found this to be acceptable. In contrast to this, 67% of those that had spoken to an adviser two or three times found this acceptable and only 26% of those that made four or more calls found this acceptable.

For customers who spoke to an adviser more than once, acceptability levels were found to vary depending on the reason they gave for needing to make contact more than once. For instance, callers who said they needed to make multiple calls due to a mistake by HMRC were the least likely to say the number of calls they had to make was acceptable.

Table 20 Acceptability by reason for speaking to an adviser more than once

Reason for needing to talk to an adviser more than once	Base	% very/fairly acceptable – number of times spoken to an adviser about the issue
Caller did not have all the information needed when they last called	161	73%
Caller had not heard back/received a reply from HMRC	216	62%
Complicated issue	342	59%
HMRC made a mistake	179	38%

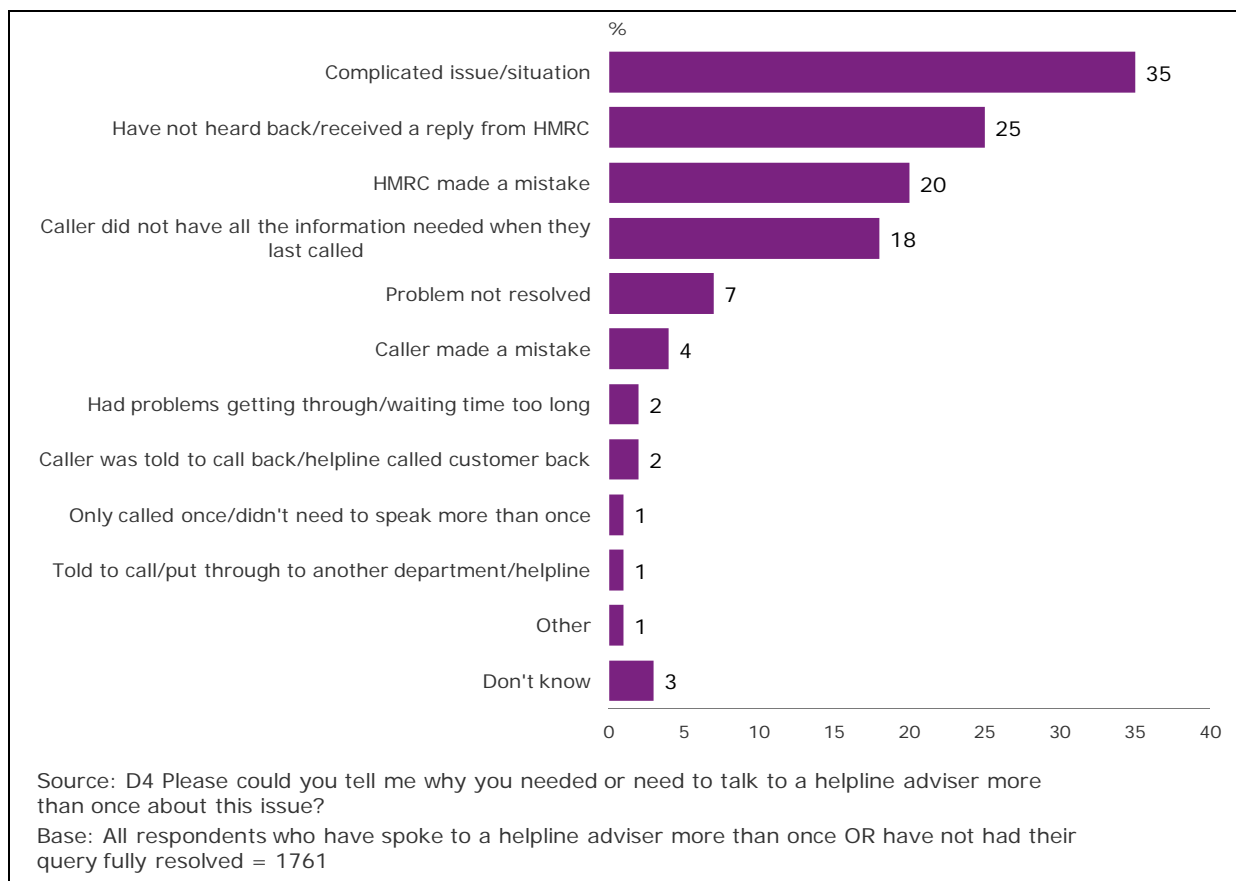
4.4 Reasons for needing to talk to the helpline adviser more than once about the issue

4.4.1 Total results

All respondents who had spoken to a helpline adviser more than once about their issue or who said their query was not fully resolved, were asked a question about why they needed to speak to an adviser more than once about the issue.

A complicated issue/situation was the most common response, given by 35% of respondents. This was followed by having not received a call back from HMRC (25%), HMRC making a mistake (20%) and the caller not having the information needed when they first called (18%) as the other most common answers.

Chart 21 Reasons for speaking to an adviser more than once about the issue – overall results



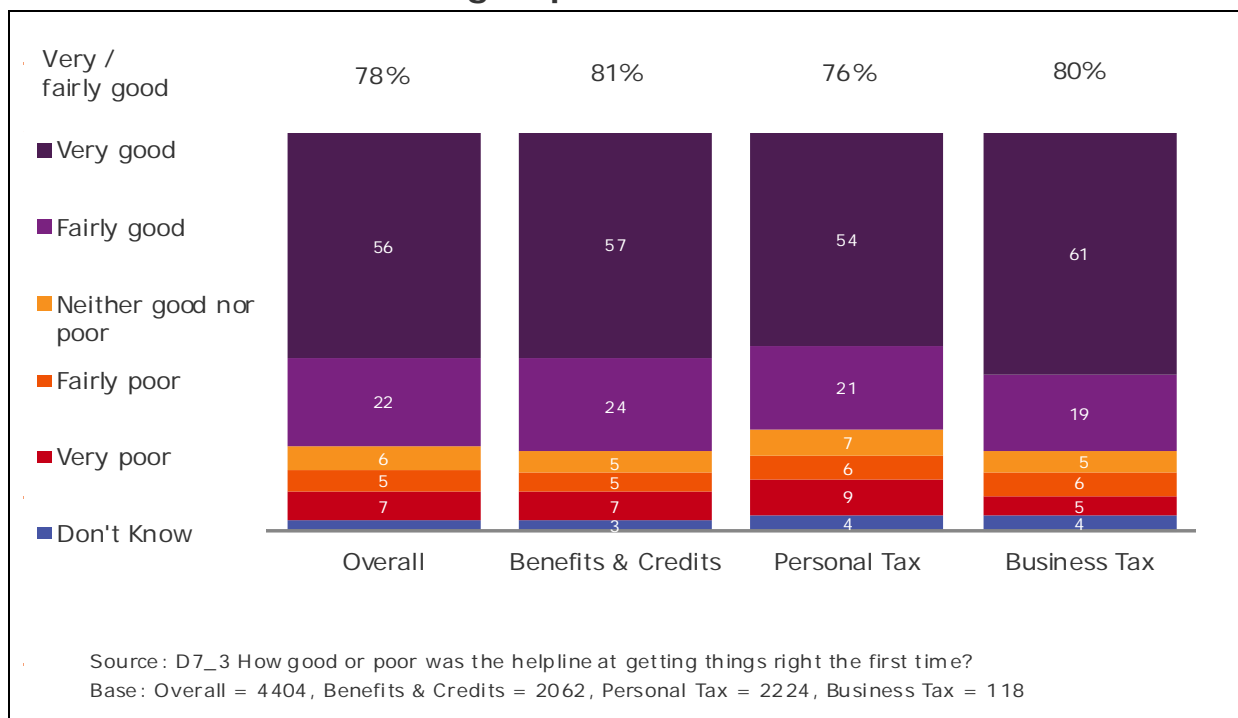
4.5 Rating of helplines getting things right the first time

4.5.1 Total and trend results

Customers were asked to rate how good or poor they felt the helpline was at getting things right the first time, using a five point scale, ranging from very good to very poor. Responses were mostly positive, with 78% of all respondents during the period April 2011 – March 2012 answering either very good or fairly good to this question.

Responses remained positive across the survey period, with no significant changes observed. Between October 2010 and March 2011, 79% of customers thought the helpline was very or fairly good at getting things right the first time and between October 2011 and March 2012 it was 78%.

Chart 22 Getting things right the first time – overall and across the three main business groups



4.5.2 Sub-group analysis

81% of customers found the Benefits and Credits helplines good at getting things right the first time. This was significantly greater than the 76% reported for the Personal Tax helplines.

4.5.3 Factors contributing to how good or poor the helpline was at getting things right the first time

A number of factors were found to correlate with ratings for getting things right the first time. Customers who found it easy to understand what to do next, easy to understand the information provided by the adviser, felt that the adviser had the right level of expertise or felt the adviser understood the query were more likely to be of the opinion that the helpline was good at getting things right the first time.

Table 23 Groups that were more likely to feel the helpline was good at getting things right the first time

	Base	% very/fairly easy to get in touch with the helpline
Overall sample	4,404	78%
Very/fairly easy to understand information provided by the adviser	3,887	84%
Very/fairly easy to understand what to do next to resolve the query	3,769	84%
Strongly agree/agree the adviser had the right level of expertise	3,818	85%
Strongly agree/agree that adviser understood the query	3,990	83%

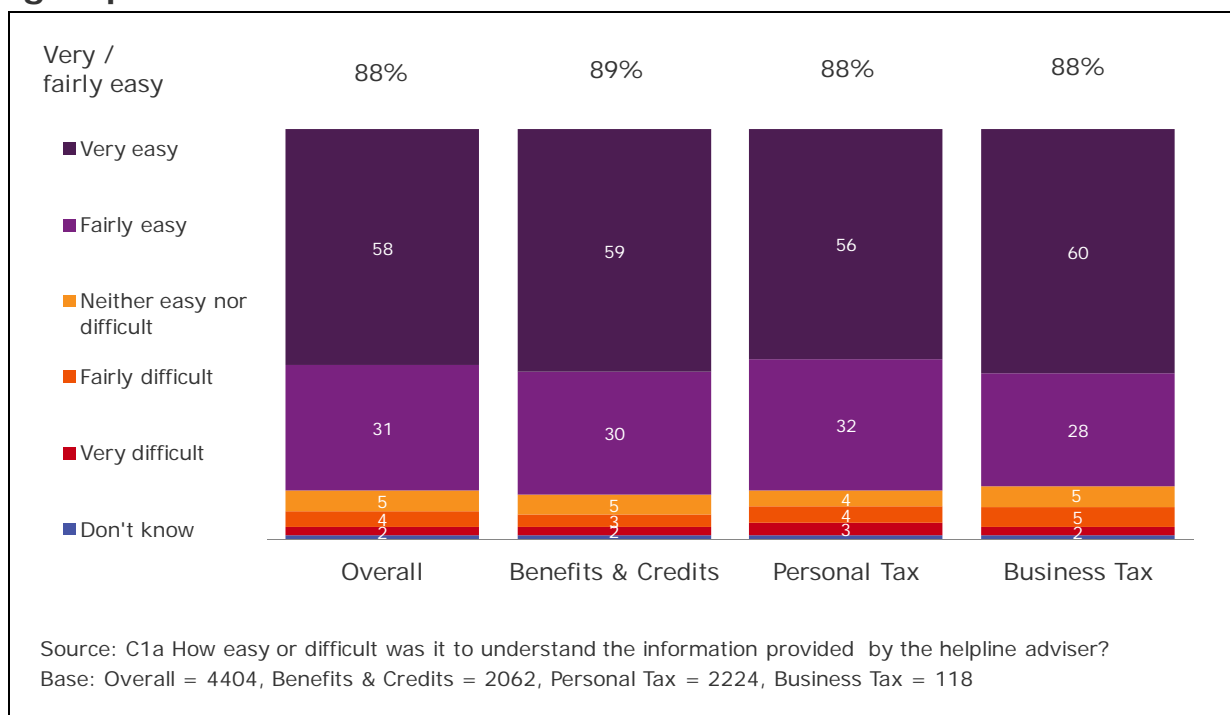
5. Helpline advisers

5.1 Understanding the information provided by the helpline adviser

5.1.1 Total and trend results

Respondents were asked to rate how easy or difficult they found it to understand the information provided by the helpline advisers, using a five point scale ranging from very easy to very difficult. Overall, 88% of customers rated this as very or fairly easy. There was no significant change in the ease of understanding information over time; 90% of customers surveyed between October 2010 and March 2011 found it very or fairly easy and this was 88% for those surveyed one year later.

Chart 24 Ease of understanding information provided by the helpline adviser – overall and across the three main business groups



5.1.2 Sub-group analysis

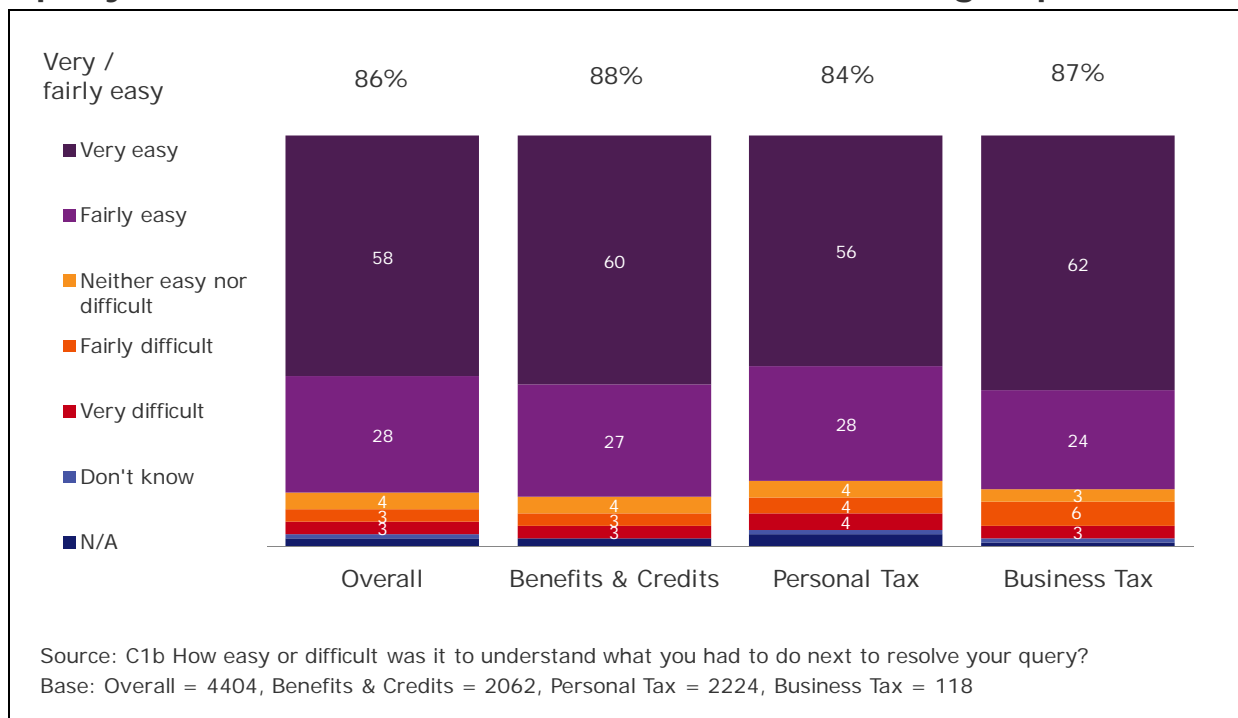
Results were consistent across each of the three main business groups, with no significant differences reported.

5.2 Understanding what to do next to resolve their query

5.2.1 Total and trend results

Respondents were asked how easy or difficult it was to understand what they had to do next to resolve their query. Once again, responses to this question were overwhelmingly positive, with 86% of respondents answering very or fairly easy and 7% claiming this was very or fairly difficult. Responses stayed consistent across the survey period with no significant differences; 85% of those surveyed between October 2010 and March 2011 thought it was very or fairly easy compared with 86% of those surveyed one year later.

Chart 25 Ease of understanding what to do next to resolve the query – overall and across the three main business groups



5.2.2 Sub-group analysis

Results were analysed to see how responses differed between the three business groups. The Benefit and Credit helplines had the greatest proportion of customers answering very or fairly easy (88%), significantly higher than Personal Tax (84%).

Across the five main helplines, the percentage of respondents answering very or fairly easy ranged from 82% to 90%. Child Benefit and NI were the two highest performing helplines at this question, with 90% of respondents saying it was easy to understand what to do next; significantly more than Taxes (83%) and OSH (82%).

5.2.3 Factors contributing to how easy or difficult it was to understand what to do next to resolve the query

Three factors were identified as potentially contributing to the ease in understanding what to do next. Customers who felt the adviser they spoke to had the right level of expertise and understood their query were more likely to understand what to do next. Also customers that found it easy to understand the information provided by the adviser were also more likely to understand what they had to do next.

Table 26 Groups that were more likely to find it easy to understand what to do next to resolve their query

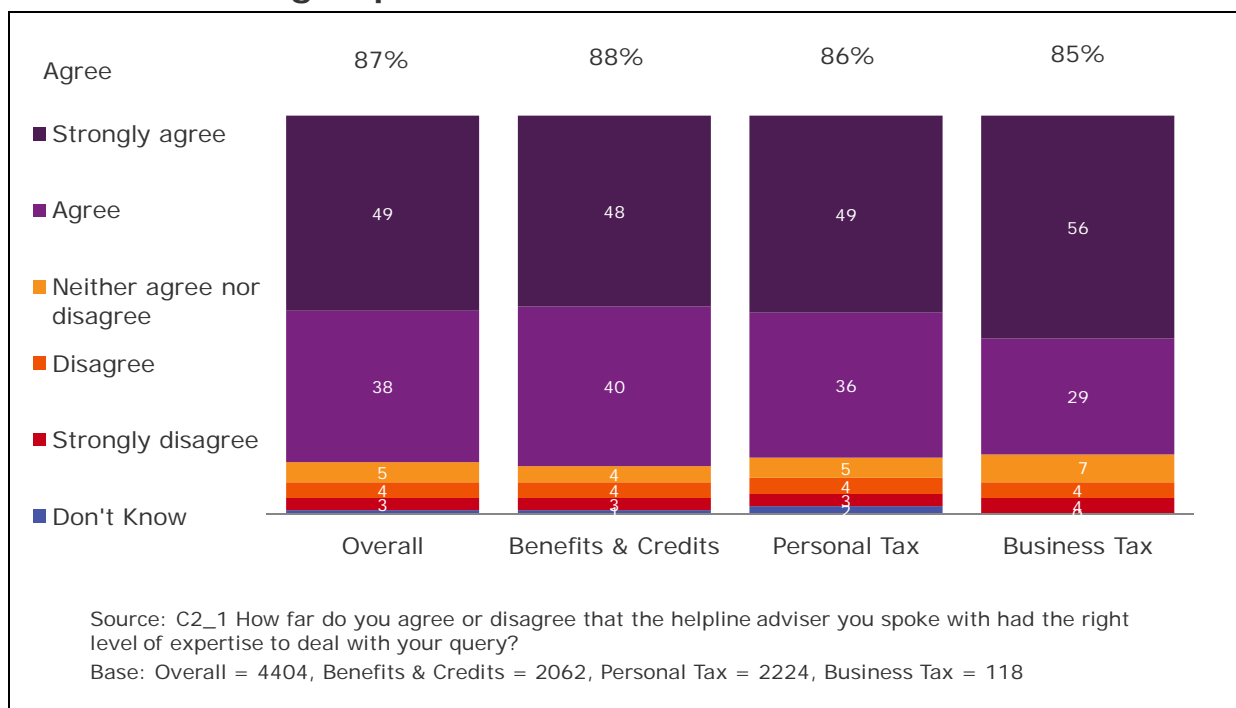
	Base	% very/fairly easy to get in touch with the helpline
Overall sample	4,404	86%
Very/fairly easy to understand the information provided by the adviser	3,887	92%
Strongly agree/agree the adviser had the right level of expertise	3,818	92%
Strongly agree/agree that the adviser understood the query	3,990	90%

5.3 Whether the helpline adviser had the right level of expertise to deal with the query

5.3.1 Total and trend results

Respondents were asked how far they agreed or disagreed that the helpline adviser they spoke to had the right level of expertise to deal with their query. Responses were given using a five point scale with answers ranging from strongly agree to strongly disagree. Results were generally positive, with 87% of respondents agreeing with the statement. There was no significant difference over the survey period, between October 2010 and March 2011 88% agreed or strongly agreed and between October 2011 and March 2012 it was 86%.

Chart 27 Agreement that the helpline adviser had the right level of expertise to deal with the query – overall and across the three main business groups



5.3.2 Sub-group analysis

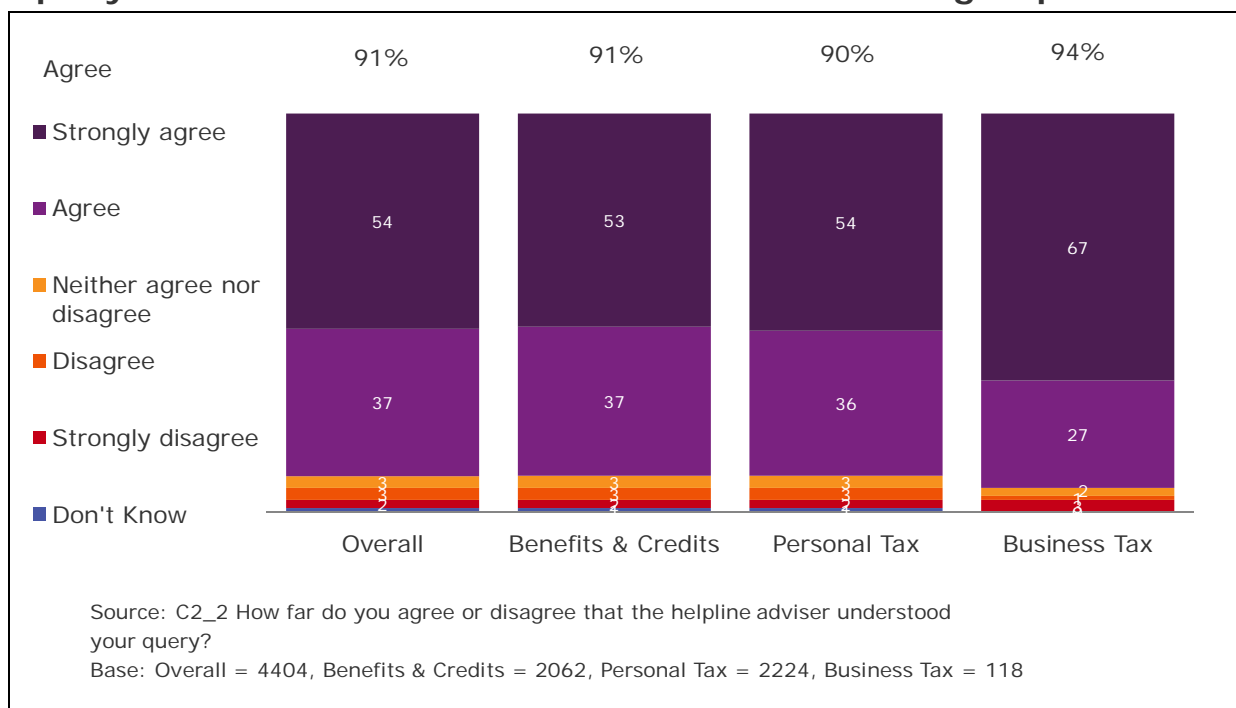
The overall picture was largely consistent, with responses similar for the three business groups. The only slight difference related to the intensity of feeling, with 56% of Business Tax respondents strongly agreeing with this statement, in comparison to 49% (Personal Tax) and 48% (Benefits and Credits).

5.4 Whether the helpline adviser understood the query

5.4.1 Total and trend results

Respondents were asked how far they agreed or disagreed that the helpline adviser they spoke to understood their query. Responses were given using a five point scale with answers ranging from strongly agree to strongly disagree. Overall 91% of respondents agreed with this statement. Results did not change over the survey period; 90% agreed or strongly agreed between October 2010 and March 2011 and 91% between October 2011 and March 2012.

Chart 28 Agreement that the helpline adviser understood the query – overall and across the three main business groups



5.4.2 Sub-group analysis

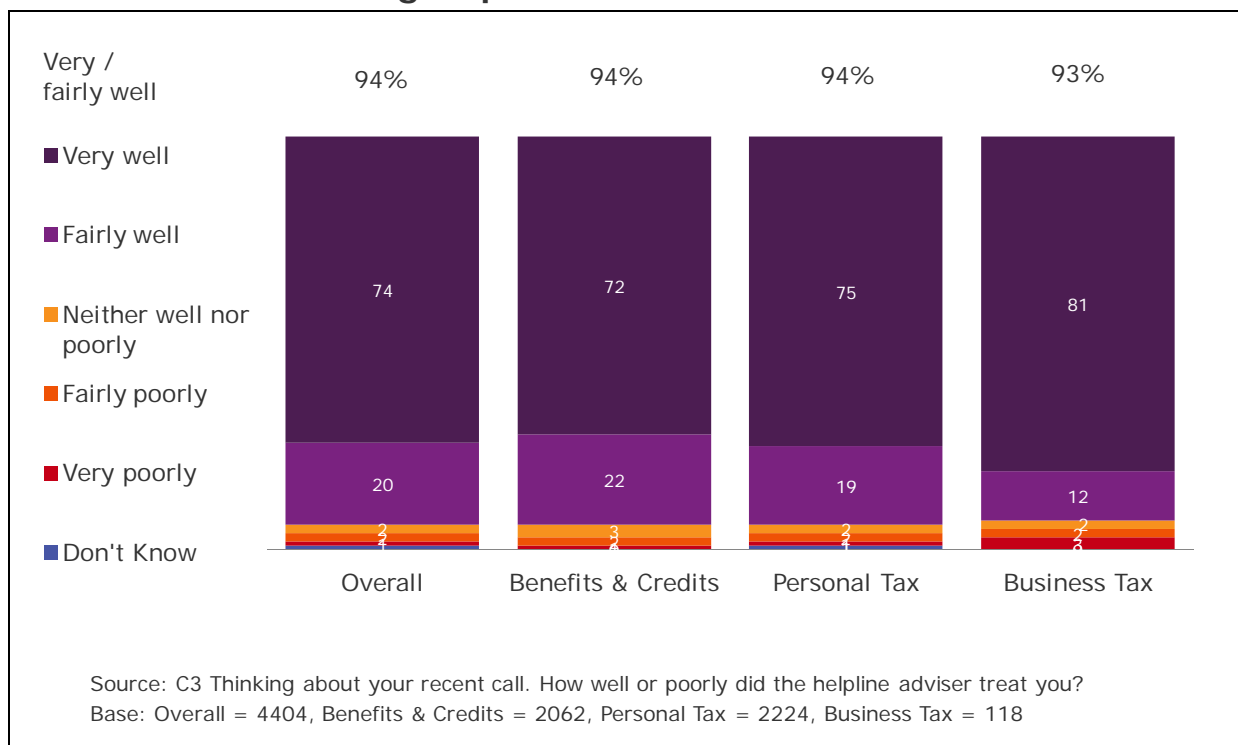
There were no significant differences between the different business groups in the proportion of customers who agreed or strongly agreed with this statement. There were differences in strength of feeling, however, with the Business Tax helplines having a greater proportion of customers who strongly agreed with the statement (67%) than the Benefits and Credits (53%) and Personal Tax (54%) helplines.

5.5 Rating of treatment by the helpline adviser

5.5.1 Total and trend results

Customers were asked to rate how well or poorly the helpline adviser treated them, using a five point scale ranging from very well to very poorly. Treatment of customers by helpline advisers was the most positively answered question in the survey, with 94% of respondents answering either very well or fairly well to this question and 3% claiming they were treated very or fairly poorly. No change was observed over time; 95% of those surveyed between October 2010 and March 2011 thought the adviser had treated them very or fairly well and 94% of those surveyed one year later.

Chart 29 Treatment by helpline adviser—overall and across the three main business groups



5.5.2 Sub-group analysis

There were no significant differences observed between the three main business groups, with Benefits and Credits (94%), Personal Tax (94%) and Business Tax (93%).

5.6 Why respondents felt they were treated very well or very poorly

5.6.1 Total results

All respondents who felt that they were treated either very well or very poorly were asked an open question regarding why they felt they had been treated this way.

The answers most commonly given by those that said they had been treated very well were that the adviser was helpful (33%), polite/courteous (30%) and quick (17%).

Only a small number of respondents said that they had been treated very badly, so caution needs to be exercised when looking at these results. Most of the answers given referred to staff not being able to help answer the query (54%) and receiving a poor service (46%).

Table 30 Why respondents felt they were treated very well or very poorly by the helpline adviser (top answers) – overall results

Why customers felt they were treated very well (3,240)	%	Why customers felt they were treated very poorly(61)	%
They were helpful	33%	Staff could not help me answer my query	54%
They were polite/courteous	30%	Poor service	46%
They were quick	17%	Rude/unpleasant	20%
Answered my question	17%	Took too long to get through to them/had to wait too long	19%
Sorted my problem/query	15%		
They understood my needs/what I wanted	14%		
They were nice	13%		

6. Improvements

6.1 How the service received could be improved

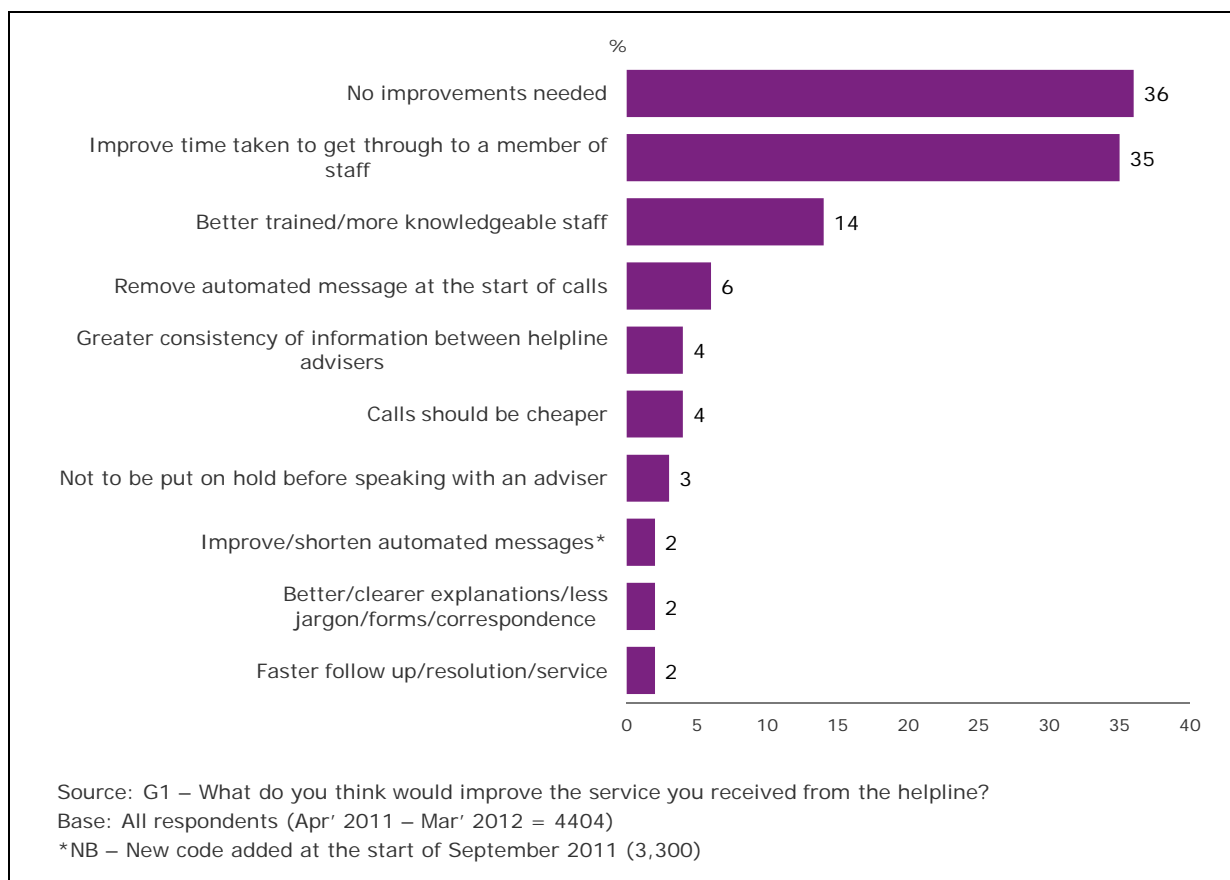
6.1.1 Total results

Respondents were asked to state, in their own words, what they felt would improve the helpline service. Interviewers categorised responses into a multicode list.

Chart 31 shows the top ten responses to this question. The most common answer was that no improvements were needed, with around a third of customers (36%) answering this.

The top two improvements suggested were reducing the time taken to get through to a member of staff (35%) and having better trained/more knowledgeable staff (14%).

Chart 31 Improvements to the helpline service (top ten answers) – overall results



These results reinforce the key areas for improvement which came out of the Key Driver Analysis. Ease of getting in touch was an area highlighted as needing improvement in the KDA similarly, one of the top improvements given at this question, was to improve the time taken to get through to a member of staff.

Similarly, getting things right the first time was an area which the KDA suggested should be focused on for improvements and this is very likely to be related to the levels of training and knowledge of staff which was the improvement 14% of respondents spontaneously said they wanted to see. This result does conflict slightly with the KDA, as the KDA also showed that most respondents felt that advisers had the right level of expertise, however, it was only a minority (14%) that said this area should be improved.

It is important to note that we would not necessarily expect the Key Driver Analysis results and the results to this question to be the same. Firstly, this question captured respondents' top of mind responses whereas the KDA looked for the underlying factors behind the overall experience rating. Secondly, the KDA looked at what issues drove the overall experience rating, and it is possible that respondents that rated their overall experience as good or very good may still think that further improvements could be made to the service. These improvements would not necessarily be captured in the KDA but would be shown at this question where we asked all respondents for their suggestions.

6.1.2 Sub-group analysis

Looking at the results by the three business groups, callers to the Business Tax helplines were most likely to think no improvements are needed (51%) compared with Benefits and Credits (37%) and Personal Tax (34%) helpline customers. Furthermore, the need to improve the time taken to get through to a member of staff was significantly greater amongst Personal Tax (36%) and Benefits and Credits customers (36%) than their Business Tax counterparts (14%).

7. Conclusions

Overall the results from the survey were positive and the overall ratings of the customer experience remained largely constant between October 2010 and March 2012.

The results demonstrated that the contact centre advisers are highly regarded by customers. The vast majority of customers thought that the advisers were knowledgeable, had treated them well, understood queries and were good at passing on information.

The results from the survey and the Key Driver Analysis indicated that the main area which could be improved is the ease of getting in touch. This was also confirmed by the fact that the most common improvement suggested was to reduce the time taken to get through to an adviser.

Ease of getting in touch is made up of two main factors: the number of calls customers have to make to get through to a helpline and the time customers have to wait on the phone before speaking with an adviser. A third of customers reported call waiting times of over ten minutes, and these respondents were notably more likely than others to say they found it difficult to get in touch. A similar proportion reported making two or more calls before getting through to an adviser, and they were also much more likely than others to say that it was difficult to get in touch. Ensuring that customers do not need to call several times to get through and that calls are answered in under ten minutes should improve the ease of getting in touch score and overall satisfaction. Of particular concern is that the call waiting times reported by customers were found to have increased over the last year.

Getting things right the first time was also found to be a relative weakness and an area which should be focused on for improvement by the Key Driver Analysis. Whilst most customers found the number of times they had to speak with an adviser acceptable, those who had to make multiple calls because of a mistake by HMRC generally thought that this was unacceptable. This suggests that focusing on reducing the number of mistakes made should improve overall satisfaction levels.

Appendix 1 - Questionnaire

PART 1 ANSWERING THE CALL

If you have called the helpline more than once recently, please answer in relation to the call you made when you were asked to take part in this survey. This was when you called the **<INSERT HELPLINE NAME>** helpline on **<INSERT DATE>**.

B1 Which of the following best describes the reason you called the helpline?

MULTI CODE, RANDOMISE LIST

- To ask a question
- To find out where to find information
- Regarding a specific/ongoing issue
- To make a transaction
- To query a bill
- To make a complaint
- To correct an error
- To notify Revenue and Customs of a change in personal circumstances/details
- To ask for a form
- To make an application
- Other (specify)

ASK ALL

B3 How many times did you have to call the **<INSERT HELPLINE NAME> helpline before your call was answered?**

SINGLE CODE

DO NOT PROMPT, ONLY READ OUT CODES IF RESPONDENT IS HAVING DIFFICULTY ANSWERING

- Once
- Two or three times
- Four or five times
- Six to nine times
- Ten to nineteen times
- Twenty times or more
- DK

ASK ALL

B5 When you first spoke with a helpline adviser, how long were you waiting before you were able to talk to them?

INTERVIEWER, CLARIFY IF NECESSARY:

THIS IS THE PERIOD OF TIME YOU LISTENED TO AUTOMATED MESSAGES OR MUSIC, BEFORE YOU SPOKE DIRECTLY WITH A HELPLINE ADVISER FOR THE FIRST TIME

DO NOT PROMPT, ONLY READ OUT CODES IF RESPONDENT IS HAVING DIFFICULTY ANSWERING

SINGLE CODE

I was put straight through

Less than one minute

Two to three minutes

Four to five minutes

Five to nine minutes

Ten to nineteen minutes

Twenty minutes or more

DK

ASK ALL

B7 How easy or difficult would you say it was overall to get in touch with the helpline?

SINGLE CODE

Very easy

Fairly easy

Neither easy nor difficult

Fairly difficult

Very difficult

DK

PART 2 SATISFACTION WITH THE CALL & HELPLINE STAFF

I am now going to ask you some questions about the call itself.

Please answer in relation to the call you made to the **<INSERT HELPLINE NAME>** helpline when you were asked to take part in this survey.

C1 How easy or difficult was it to understand...

RANDOMISE

...the information provided by the helpline adviser?

...what you had to do next to resolve your query?

SINGLE CODE

Very easy

Fairly easy

Neither easy nor difficult

Fairly difficult

Very difficult

n/a (only show for second statement)

DK

C2 How far do you agree or disagree that...

RANDOMISE

...the helpline adviser you spoke with had the right level of expertise to deal with your query?

...the helpline adviser understood your query?

SINGLE CODE

Strongly agree

Agree

Neither agree nor disagree

Disagree

Strongly disagree

DK

C3 Thinking about your recent call. How well or poorly did the helpline adviser treat you?

SINGLE CODE

Very well

Fairly well

Neither well nor poorly

Fairly poorly

Very poorly

DK

IF ANSWERED “VERY WELL” OR “VERY POORLY” TO C3

C4 Why do you say that?

PROBE: Anything else?

OPEN

DK

PART 3 FIRST CONTACT RESOLUTION
--

D1 Still, thinking about when you called the <INSERT HELPLINE NAME> helpline on <INSERT DATE>, was this the only time you talked to a helpline adviser about this particular matter or have you talked with them on more than one occasion?

INTERVIEWER: IF MORE THAN ONE CONTACT, CHECK THE RESPONDENT IS DEFINITELY THINKING ABOUT THE SAME MATTER AND THEN PROBE FOR NUMBER OF TIMES RESPONDENT HAS SPOKEN TO A HELPLINE ADVISER ABOUT THIS PARTICULAR ISSUE

SINGLECODE

Once

Two or three times

Four or five times

More than five times

Don't know

D1b Still thinking about this particular matter, how acceptable was the number of times you had to speak to an adviser about the issue?

SINGLE CODE

Very acceptable

Fairly acceptable

Neither acceptable nor unacceptable

Fairly unacceptable

Very unacceptable

Don't know

D2 Has your query now been fully resolved?

For example, have you received all of the help or information you were looking for?

SINGLE CODE

Yes

No

DK

IF MORE THAN ONCE AT D1 OR “NO” AT D2 ASK D4

D4 Please could you tell me why you needed or need to talk to a helpline adviser more than once about this issue?

DO NOT READ OUT, MULTICODE

Complicated issue/situation

HMRC made a mistake

Have not heard back/received a reply from HMRC

Caller made a mistake

Caller did not have all the information needed when they last called

Other (please specify)

DK

ASK ALL

D7 How good or poor was the helpline at...

RANDOMISE

...getting things right the first time?

SINGLE CODE

Very good

Fairly good

Neither good nor poor

Fairly poor

Very poor

DK

PART 4 OVERALL MEASURE

E1 Overall, how satisfied were you with the outcome of the call to the <INSERT HELPLINE NAME> helpline on <INSERT DATE>?

SINGLE CODE

Very satisfied

Fairly satisfied

Neither satisfied nor dissatisfied

Fairly dissatisfied

Very dissatisfied

DK

E2 Putting aside the outcome now, overall, how would you rate your recent experience of calling the <INSERT HELPLINE NAME> helpline?

Would you say this was..

SINGLE CODE

Very good

Fairly good

Neither good nor poor

Fairly poor

Very poor

DK

PART 5 CUSTOMER EXPECTATIONS

F1 And would you say your recent experience of calling the Revenue and Customs helpline was better than you expected, worse or in line with your expectations?

SINGLE CODE

Better

Worse

In line with expectations

DK

PART 6 IMPROVING SATISFACTION

G1 What do you think would improve the service you received from the helpline? PROBE: What else?

DO NOT READ OUT, MULTICODE

MULTI CODE, RANDOMISE

No improvements needed/good service received

Improve time taken to get through to a member of staff (more advisers)

Better trained/more knowledgeable staff

Not to be put on hold before speaking with an adviser

To be put on hold instead of hearing an engaged tone

Greater consistency of information between helpline advisers

Remove automated messages at the start of calls

Calls should be cheaper

Should not be cut-off after automated message

Other (specify)

DK

PART 7 DEMOGRAPHICS & CLOSING QUESTIONS

ASK X1 – X5 TO “INDIVIDUALS” NOT TO “AGENTS” OR “BUSINESSES”

Lastly, I would just like to ask you a few questions about yourself.

X1 How old were you on your last birthday?

NUMERICAL OPEN (ALLOW RANGE 16 -99)

Refused

IF REFUSED AT H1 ASK H2

X2 In that case could you tell me which of these age bands you fall into?

SINGLE CODE

19 or under

20-29

30-39

40-49

50-59

60-64

65-69

70-79

80 or over

Refused

X3 Which of the following groups do you consider you belong to?

SINGLE CODE

READ OUT CATEGORIES IN BOLD THEN PROBE WITH DETAILED CATEGORIES.

White

British

Irish

Any other white background (PLEASE WRITE IN)

Mixed

White and Black Caribbean

White and Black African

White and Asian

Any other mixed background (PLEASE WRITE IN)

Asian or Asian British

Indian

Pakistani

Bangladeshi

Any other Asian background (PLEASE WRITE IN)

Black or Black British

Caribbean

African

Any other Black background (PLEASE WRITE IN)

Chinese

Any other background (PLEASE WRITE IN)

Refused

X4 Which of these best describes your employment at the moment?

SINGLE CODE

- Working in a paid job (30+ hours)
- Working in a paid job (8-29 hours)
- Working in a paid job (Less than 8 hours)
- Self-employed
- Not in paid employment/looking after house or home
- Full time student at school
- Full time student at university/polytechnic/college
- Part time student
- Unemployed
- Retired from paid employment
- Temporarily/permanently off sick

X5 For classification purposes only I would now like to ask about annual household income.

Please can you tell what your annual household income is before tax? Please include earnings from employment or self-employment, income from benefits and pensions, and income from other sources such as interest from savings.

SINGLE CODE

- Up to £6,420
- £6,421 to £9,999
- £10,000 to £19,999
- £20,000 to £29,999
- £30,000 to £39,999
- £40,000 to £50,000
- Over £50,000
- DK
- R

ASK X6 TO “BUSINESSES” NOT TO “AGENTS” OR “INDIVIDUALS”

Lastly, I would just like to ask you a question about your business/organisation.

X6 How many employees does your company have who pay tax under PAYE (including yourself)?

SINGLE CODE

1-9

10-49

50-249

250-999

1,000+

DK

Thank & close

X7 INTERVIEWER: PLEASE CODE GENDER OF RESPONDENT

SINGLE CODE

Male

Female

Appendix 2 - Sample profile

Sample profile – Individuals

	Unweighted		Weighted
	Count	%	%
Sex			
Male	1622	38%	37%
Female	2625	62%	63%
Ethnicity			
White	3656	86%	86%
BME	509	12%	12%
Age			
19 or under	49	1%	1%
20-29	711	17%	17%
30-39	1066	25%	26%
40-49	1077	25%	26%
50-59	681	16%	16%
60-64	270	6%	6%
65-69	197	5%	4%
70-79	121	3%	3%
80 or over	28	1%	1%
Working status			
Full time	1503	35%	34%
Part time	834	20%	20%
Self employed	493	12%	12%
Student	48	1%	1%
Retired	440	10%	9%
Not working	928	22%	23%

Sample profile – Reason for calling helpline

	Unweighted		Weighted
	Count	%	%
To ask a question	3002	68%	67%
Regarding a specific/ongoing issue	1791	41%	40%
To notify Revenue and Customs of a change in personal circumstances/details	1736	39%	41%
To correct an error	972	22%	21%
To find out where to find information	938	21%	21%
To make an application	760	17%	18%
To query a bill	582	13%	13%
To ask for a form	530	12%	12%
To make a complaint	194	4%	4%
To make a transaction	182	4%	4%
To check details/ information	56	1%	1%