



Research report

ADL Live Evaluation

Evaluating the ADL and identifying opportunities for future improvement

Business Customer Unit

Her Majesty's Revenue and Customs Research Report Number 123

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

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.

Contents

Research requirement (background to the project)	3
Who did the work (research agency)	3
When the research took place	3
Method, Data and Tools used, Sample	3
Main Findings	4

© Crown Copyright 2009 Published by Her Majesty's Revenue and Customs. Disclaimer: The views in this report are the authors' own and do not necessarily reflect those of HM Revenue & Customs.

Research requirement (background to the project)

Following feedback from Agents about HMRC's general phone line, HMRC introduced the Agent Dedicated Line (ADL) to improve the quality of service for Agents in early 2009. The service was rolled out nationally, across all Self Assessment and Tax Contact centres.

HMRC's Customer Understanding Team wanted to understand how this service was performing.

Research was commissioned to understand the extent to which the ADL was meeting expectations and requirements, and to identify ways that the service could be improved.

Who did the work (research agency)

The Futures Company

When the research took place

February/March 2009

Method, Data and Tools used, Sample

A two stage qualitative approach involving both staff and Agents was taken:

(i) Observations and interviews were conducted with HMRC staff. These included depth interviews with Call Centre Managers and Tier 2 technicians, and Mini Groups with Tier 2 advisors.

(ii) Interviews and discussions were conducted with Agents. The sample was split 50:50 between small (1 to 25 employees) and large companies (25 to 100 employees), and between Agents who had used ADL and those who had not.

Main Findings

Agents and their attitudes towards HMRC

Agents have varying degrees of interaction with HMRC in terms of frequency and complexity. This is due to a range of needs and nature of queries dictated by the different types of Agents e.g. Book-keeper versus Tax specialist.

Overall, Agent opinions of HMRC are fairly positive and the service they have received is felt to be an improvement to the past in terms of providing a faster service and willingness of staff to help. However, they feel that closure of local offices has compromised the service HMRC used to offer.

Agents' expectations of efficiency in their dealings with HMRC are generally increasing as Agents look to deliver an efficient service to their clients. These expectations translate directly into increased expectations of what ADL can and should deliver.

Use of sources and channels

Agents have a range of needs when it comes to seeking information and advice on tax issues. They range from basic types of issues around requiring client information, making transactions and following a procedure/chasing an ongoing query, to more unusual and specific types of issues where guidance around a client query or scenario is needed.

Agents use a combination of sources to resolve their tax issues and HMRC is just one source. In addition they use industry publications, internal sources (colleagues) and external sources (specialist). Agents in smaller companies tend to have more limited sources than those in larger companies. Dependence on multiple sources is a result of the limitations of each rather than preferred Agent behaviour.

Agents judge the quality of a source by a range of interlinked criteria and a good quality service is one that fulfils all of these needs:

- Quick to access and convenient
- Reliable, accurate and up to date
- User friendly/good treatment from staff
- Quick to resolve issue
- Accountable

The quality of HMRC as a source is perceived differently across channels (phone, website, post) and Agents tend to use a combination of channels tactically as no single channel successfully meets all of their needs.

There are pros and cons to all three channels:

The website offers benefits of convenience but is limited to answering only the more basic types of Agent queries. In addition, issues around the search function and poor signposting on the website is causing frustration with both Agents and staff as it leads to avoidable calls to the contact centre.

The general phone line offers reassurance and accommodates a larger scope of queries, however, it can be time consuming for Agents and confusing when inconsistent advice is given. There is also a lack of accountability as Agents have no written record of the call confirming the information agreed in the telephone conversation i.e. in the form of an email.

Writing to HMRC enables Agents to manage complex queries and provides them with a paper trail as evidence, but this can be slow and unreliable.

The Agent Dedicated Line (ADL) Experience

Agents hear about tax related news stories from a multitude of touch points such as business networks (e.g. Lexis Nexis), word of mouth (e.g. colleagues), conferences, governing bodies, bulletins and publications as well as from HMRC via the website or written correspondence.

Awareness of the ADL is generally low amongst Agents and varies depending on the number of touch points Agents have available to them. Typically Agents in larger companies have more touch points and are more likely to have heard of the ADL.

Agents expect to hear about the ADL directly from HMRC either in writing or as a news update on the HMRC website. There is an opportunity to raise awareness and improving communication of the ADL will reduce calls to and referrals from the general phone line.

Agent understanding of the ADL service varies, and in order to avoid disappointment and confusion expectations need to be managed.

Overall those who have used the ADL are satisfied with the service. Relative to other differentiated business services, in many respects the ADL is rated more highly. The main benefits to the ADL over the general line is reduced waiting time and a better relationship with staff as Agents feel that staff on the ADL have a better understanding of their needs. Staff also feel the benefit of the line as they feel that Agents are in a better mood when they come through to them and allows them to work more efficiently as the service is more professional.

An Agents' experience of the ADL varies along a number of points along their journey of their call. On the surface the service appears to be ticking all the boxes as Agents get through more easily and get tax issues resolved, however an Agent's experience can greatly differ depending on the nature of their query; if the query is more complex and requires a Tier 2 technician the process can be longer and inefficient than if the query is more basic and can be resolved by a Tier 1 advisor.

Overall Agents feel that the quality of the ADL service is satisfactory, but there is room for improvement.

Quality and confidence of advice and information is questioned by Agents as they are sometimes given conflicting or inaccurate information. In addition staff are also concerned about giving out wrong information. Improved interaction between Tier 1 and Tier 2 as well as more training and on the job quality checking should help to improve the consistency of service and restore confidence.

Perceptions of call length targets are impacting perversely on the standard of service. Whilst Agents desire a speedy service they feel that this is compromising on the level of service they receive as they feel that they are being rushed off the call and limited in the number of queries they can ask on one call. Similarly staff feel under pressure to meet call length targets and can also feel that it is compromising on the level of service they offer Agents.

Agents would welcome greater personalisation within the ADL service. There is a perception that a personalised approach is necessary to achieve a more efficient service. There is an appetite to be able to speak to a named advisor and for advisors to have a history of an Agent's queries, to work in partnership to jointly resolve queries in a collaborative, trusting relationship.

Linked to personalisation, for many Agents the need for accountability and reassurance is paramount. Experiences of inconsistency in advice have raised anxiety and increased the need for a more accountable service.

Agents have high expectations of the ADL and show some frustration that the service is limited to only the phone. A multi-channel solution would greatly enhance the ADL service experience. Advisors would also welcome enhanced IT functionality to allow them increased access to client accounts for simple transactions and help improve the Agent's experience.