



HM Revenue and Customs Contact Centres

Customer Research 2007/2008

Submitted to

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April 2008

1 Executive Summary

1.1 Background

Contact Centres 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 on four main helplines; the Employer, Taxes, Tax Credits and National Advice Service (NAS) lines. This report presents results on research conducted on these four helplines.¹

In total over the annual rolling survey more than 4500 interviews were conducted for the four main helplines on a monthly basis between March 2007 to February 2008.

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.

- Nearly two thirds of contact was initiated by respondents themselves and not pre-empted by HMRC. Forty three percent of respondents called HMRC for help with a query, and a further 20% to inform of a change in circumstance. Nearly three quarters of Employer (72%) and two-thirds of NAS (65%) callers contacted HMRC unprompted for help with a query. Forty two percent of Tax Credit contact was to inform of a change in circumstance.
- Nearly three quarters of respondents called on their own behalf (74%). Fifteen percent called on behalf of another person, 4% on behalf of a business they owned or directed and 7% on behalf of an employer. Most Tax Credit (96%) and Taxes (86%) helpline callers called on their own behalf; Employer and NAS callers were more likely to call on behalf of a client (36% and 20%) or employer (21% and 17%)².
- The majority of respondents found the telephone number to contact on a letter, form or other source of information sent out by HMRC (64%). The majority also

¹ From August 2007/08, HMRC extended the survey to include five additional lines of business: Child Benefit, Construction Industry Scheme, Payment Enquiry, Self-Employment; and Online Services.

² Comparisons across helplines should be treated as indicative only, and may not represent a 'real' difference in service.

stated that they found it very easy to get the right telephone number to call (76%). This was highest amongst Tax Credits callers (86%). Ninety five 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 four percent of respondents had access to the internet. Ninety five percent of NAS and Employer callers, 81% of Taxes and 75% of Tax Credit callers had access.
- 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 (30%). This was higher amongst callers to the Employer helpline and lower amongst those calling Taxes (37% and 23% respectively).
- Of the 67% of respondents who had visited the Revenue and Customs website, 66% overall stated that they were satisfied with it (17% being 'very satisfied'), whilst 14% stated that they were dissatisfied. This compares with the ORC Public Sector benchmark figure of 75%³. Most Employer (88%) and NAS (82%) callers had visited the website compared with fewer Taxes (62%) and Tax Credits (47%) callers. Satisfaction was 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:

- Overall, 89% stated that they were satisfied with the time it took to get through to a member of staff.
- Ninety seven percent of respondents agreed that the member of staff they spoke to listened to what they had to say. This level of agreement was consistent across the helplines. Seventy eight percent strongly agreed that staff listened to what they had to say.

³ This is the current ORC International public sector benchmark produced from the customer research data of nearly 70 central government departments and agencies.

- Ninety six percent agreed that the member of staff they spoke to understood the reason for their call. This was consistent across the different helplines (95% NAS, 96% Employer, 95% Taxes and 94% Tax Credits).
- Ninety four percent of respondents agreed that the member of staff they spoke to asked appropriate questions to understand the enquiry. Three quarters (76%) strongly agreed that the member of staff asked appropriate questions. Strong agreement was higher amongst Employer callers (80%) and lower amongst Taxes callers (74%).
- Eighty one percent of all respondents stated that they got the information that they needed at the first attempt.
- The majority of calls (84%) were dealt with by the first member of staff spoken to, 11% of calls were transferred, 8% were given the number of someone else to call, 5% were told that someone would call them back and a further 4% 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 there and then. Overall, 72% of respondents stated that they were given a reason. This was higher amongst callers to the Employer (81%) and Taxes (78%) helplines and lower amongst NAS (68%) and Tax Credit (62%) callers.
- The 493 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. Of the 489 respondents who answered, 72% of respondents stated that they were satisfied.
- All respondents who were transferred were asked how acceptable they thought this was. Overall, 10% said that being transferred was not at all acceptable.
- Of those respondents who had to make further contact to get the information they required, 34% had called the relevant helpline a further 1-2 times – 8% calling once more and 26% calling twice more.

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 87% of respondents stated that they felt their query was either very or fairly simple, with 52% of respondents stating that they expected their query to be dealt with immediately. Two thirds of Employer (68%) and NAS (65%) callers and less than half of Taxes (47%) and Tax Credit (41%) callers expected their query to be resolved immediately.
- When respondents' expectation of how quickly their query should be answered was compared with the 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 32% 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:

- Ninety three percent of respondents stated that they were satisfied with the ease of understanding the call. High levels of satisfaction were evident amongst Employer and NAS callers (95% in each) and Taxes and Tax Credits helplines (92%). Two-thirds of respondents were 'very satisfied' with ease of understanding the call was evident (63%).
- Eighty eight percent of respondents were satisfied with the usefulness of the response received.
- Ninety two percent of respondents were satisfied with the time taken providing advice or information.
- 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.
 - 99% agreed the staff member spoke clearly. This was consistent across the helplines.

- 98% believed the staff member behaved in a professional manner. This was consistent across the helplines.
- 98% agreed the staff member was polite. This was consistent across the helplines.
- 95% agreed that they were helpful.
- 94% felt that the staff member was confident in dealing with their enquiry.
- These high levels of satisfaction compare with the ORC Public Sector Benchmark figures of: 95% for politeness, 92% for helpfulness, 94% for professional conduct.
- Just 3% of respondents thought that the person they spoke to was too formal, 1% felt they were too informal and 96% thought the manner was about right.
- Overall, 94% of respondents stated that they were satisfied with the way the call was handled by the member of staff.
- 95% of respondents 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 eight 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 90%. This is above the current ORC Public Sector benchmark of 87%.
 - 95% of callers to the Employers helpline stated that they were satisfied.
 - 93% of NAS callers were satisfied.
 - 89% of Taxes customers were satisfied.
 - 88% of Tax Credits customers indicated that they 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 over half of all respondents stated that no improvements were needed, a good service was received (54%).

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 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 2007 and February 2008.

HMRC Data Security issues in December 2007 meant that sample details were delayed for 4 weeks. Thus in January 2008, we completed interviews for both December and January call centre enquiries. This factor has been borne in mind during analysis.

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.

Table 1.1 Target interviews

	Target interviews per month	Total target over one year	Total Annual total number of interviews
Employers Helpline	60	720	724
Tax Credits Helpline	120	1440	1446
Taxes Helpline	120	1440	1448
National Advice Service Helpline	80	960	724
Overall	380	4560	4342