HMRC's Customer Service - How HMRC reports on digital customer satisfaction, post and telephony

Summary

HM Revenue and Customs (HMRC) is a customer centric organisation and one of our three strategic objectives is to transform tax and payments for our customers. We are investing in transforming into one of the most digitally advanced administrations in the world and central to this is the delivery of multi-channel customer services. In order to keep pace, modernise and respond to our customers' ever changing needs we need to change some of the things we measure - and some of the ways we measure - our performance, to ensure we deliver the service offering our customers expect.

1. Digital Customer Satisfaction

As we transform into a digital by default organisation, we aim to achieve an average of 80% customer satisfaction with all our digital services across the year.

We measure customer satisfaction across all our digital services as the percentage of customers responding to exit surveys that they were either 'satisfied' or 'very satisfied' with the service, and this was 83% in 2016-17. Table 1.0 sets out the results for each of our digital services.

However, during 2015-16 we started tracking and reporting performance against a proportion of our digital products (some services in the Personal Tax Account (PTA), Business Tax Account (BTA), Webchat and Social Media).

We used the Government Digital Service (GDS) method of measuring satisfaction which applies a weighting to a customer's exit survey response, which is dependent on the response provided. Weightings are applied as follows;

> very satisfied = 100%
>
> satisfied = 75%
>
> neither satisfied or dissatisfied = 50%
>
> dissatisfied = 25%
>
> very dissatisfied = 0%

The GDS satisfaction score for this select group in 2016-17 was 74% but across all digital services the GDS result was 80%.

Table 1.0 – Digital exit survey customer satisfaction score by service (2016-17)

Digital Services	Survey Responses	GDS Csat Score	% 'Satisfied' and 'Very Satisfied'
Online Payments Gateway	1,928,795	84.2%	89.4%
PTA Tax Estimate Service*	295,320	77.4%	81.1%
Business Tax Account*	807,865	74.2%	75.7%
PTA Car Benefit Tax*	6,740	76.7%	79.9%
i-Forms	57,377	71.5%	71.8%
PTA Tax Credits*	780,645	83.4%	86.7%
PTA Homepage*	960,440	70.2%	71.2%
PTA P800 Tax Reconciliation*	52,229	65.6%	64.0%
PTA Tax Repayments*	248,680	86.0%	92.0%
Agent Online Self Service	9,769	78.8%	82.0%
Company Accounts Tax Online	32,407	67.7%	68.3%
National Insurance State pension	573,042	88.9%	93.8%
SA Opt Out	195,352	83.7%	85.2%
PTA Trusted Helper Friends and Family*	329	63.7%	61.4%
PTA Medical Benefits*	516	71.9%	74.4%
PTA Track Your Forms*	16,473	71.5%	71.6%
Marriage Allowance	168,870	96.7%	98.9%
Employment Intermediaries	14,221	60.1%	56.8%
Register Charity Details	3,506	68.0%	66.9%
Self-Assessment (Portal)	53,362	67.1%	68.3%
VAT (Portal)	1,546	58.5%	53.9%
Construction Industry Scheme (Portal)	890	39.0%	37.6%
Stamp Duty Land Tax (Portal)	21	71.4%	76.2%
Basic PAYE Tools (Portal)	1,259	58.2%	54.0%
Corporation Tax (Portal)	38	34.9%	23.7%
Twitter & Facebook*	899	69.9%	68.5%
Web Chat*	501,798	74.3%	72.5%
Total	**6,712,389**	**80.0%**	**83.0%**

Select Group (BTA, PTA, Webchat and Social Media)   *74.3%*

Because some services moved onto the PTA platform part way through the year, it is not possible to reproduce the performance of the select group from the volumes listed above.

Through the year it became apparent that the GDS methodology was not fit for purpose. For example, should 100 customers respond to the exit survey that they were 'satisfied' with our digital service, the maximum customer satisfaction score would be 75% (100 customers multiplied by 75% 'satisfied' weighting). In this example, we would interpret the result as a failure against our stretching 80% target - although all customers have said they are satisfied. We therefore decided as this is a customer satisfaction measure that a clearer approach would be to simply report the percentage of customers that were either 'satisfied' or 'very satisfied' with our digital services.

We are committed to capturing and responding to customer feedback to ensure we build on these positive satisfaction scores and continuously improve our digital services so that they continue to meet our customers' changing needs.

2. Post

Historically we prioritised customer service and compliance post that was viewed as having a customer impact, this resulted in around 60% being classed as priority. We received around 20 million post items in 2016-17 (of which 19.5 million items related to Customer Services – we forecast 16.5 million items in 2017-18), with around 12.5 million targeted priority post items.

Statistical samples were previously used to measure how quickly we turned around the priority post and a representative sample of around 0.2% was used to calculate our performance. Our compliance and customer service priority post has been targeted to turnaround 80% within 15 days and 95% within 40 days. There are separate targets for benefits and credits, to deal with new claims and changes of circumstances within 22 days for UK claims and 92 days for international claims which we receive across contact channels.

As part of our transformation into a more digital organisation we have started to digitise our physical mail through the Digital Mail Service (DMS) facility. This has provided an opportunity to build a more graduated post measurement framework from 2017-18 reflecting the customer's priority for responding to post and brings into sight more post including that from benefits and credits, as set out below:

		Target
I-forms		95% in 7 Days

Post	**Category 1:** Correspondence with a financial Impact to Benefits or repayments, e.g.
	  - *Self Employment Services*
	  - *Disputed Charges*
	Category 2: Customer Change of Circumstances or data requests - we are required to respond to the customer*, e.g.*
	  - *Pensions*
	  - *Casework*
	  - *Pension Calculation Requests*
		Prioritised
		80% in 15 Days, 95% in 40 Days

	Category 3: Maintenance workloads, no response required, e.g.
	  - *Record Maintenance*
	Category 4: Non-Core Workloads, e.g.
	  - *Return Letter Service*
		Monitored Internally

Under the new framework, total volumes are expected to remain broadly similar in 2017-18 at around 20 million items but this is largely due to the inclusion of around 2.5 million post items that relate to benefits and credits. This will contribute to an increase in targeted post items to around 15 million in 2017-18.

Currently around 45% of post has migrated to DMS and by the end of 2017-18 we expect over 70% will be on DMS. Where DMS is in place we no longer need to sample to measure post turnaround as the system readily captures the information for each post item. We can also use the DMS information to extrapolate turnaround times for similar post that has not yet moved to DMS – essentially, the DMS information provides a sample size of around 45%, using current migration levels. For post that is not covered by DMS (for example compliance post), statistically representative sampling will continue.

Where customers expect a timely response, such as correspondence with a financial impact or where customers make data requests, we will turnaround 80% within 15 days and 95% within 40 days. We will also monitor turnaround times internally for post where customers are not expecting a response, such as record maintenance.

3. Telephony

There is no single standard industry metric for measuring call service performance and different organisations measure it differently. HMRC customers like to have assurance and while we have seen use of our digital services increase, we have not seen this translate into a significant drop in demand for traditional channels. Historically, we measured telephony performance by monitoring the percentage of call attempts handled. We are committed to learning from our own experience and the experience of other organisations. In 2015-16 we introduced an additional measure which is based on the average speed of answer and the percentage of customers needing to wait over 10 minutes to speak to an adviser. We will continue to review our telephony measures to ensure they properly reflect customers' experiences when contacting HMRC.

Call Attempts Handled

Customers access our helplines by calling one of our 0300 telephone numbers. Each call to a helpline is counted as a *call attempt*.

On most helplines customers firstly hear **initial messages**. These provide information on current issues (e.g. payment problems in tax credits) or promote our digital services. Most calls hanging up in the initial messages are counted as *handled*.

Those customers that stay on the call are then routed into our main **automated routing and messaging** systems where customers are; guided to the right adviser line; taken through some security steps speeding up the call for the customer having completed these steps before speaking to an adviser and; provided with further information relevant to their enquiry. Where customers hang up or disconnect in the automated system, these are treated as *handled*. While in the automated system, in order to manage customer expectation and minimise customer costs, checks are made to determine if there are sufficient advisers available with necessary skills to answer the call in an acceptable timeframe. If this check fails, the customer is played a busy message and disconnected. Where HMRC disconnects, these calls are counted as *not handled*.

After the automated system, the call is moved into a **queue for an adviser**. A second, more refined, skill check is carried out at this point and if this check fails, the customer is played a busy message and disconnected. Again, where HMRC disconnects, these calls are counted as *not handled*. Calls that pass the skill check join the queue to speak to an adviser. If the customer decides to hang up at any point before they are answered, these calls are treated as abandoned and are counted as *not handled*.

The majority of calls are **answered by an adviser** and these are counted as *handled*.

A small number of calls receive an engaged tone if the telephony system is experiencing technical difficulties. Where calls cannot come through due to problems with our systems, these calls are counted as *not handled.*

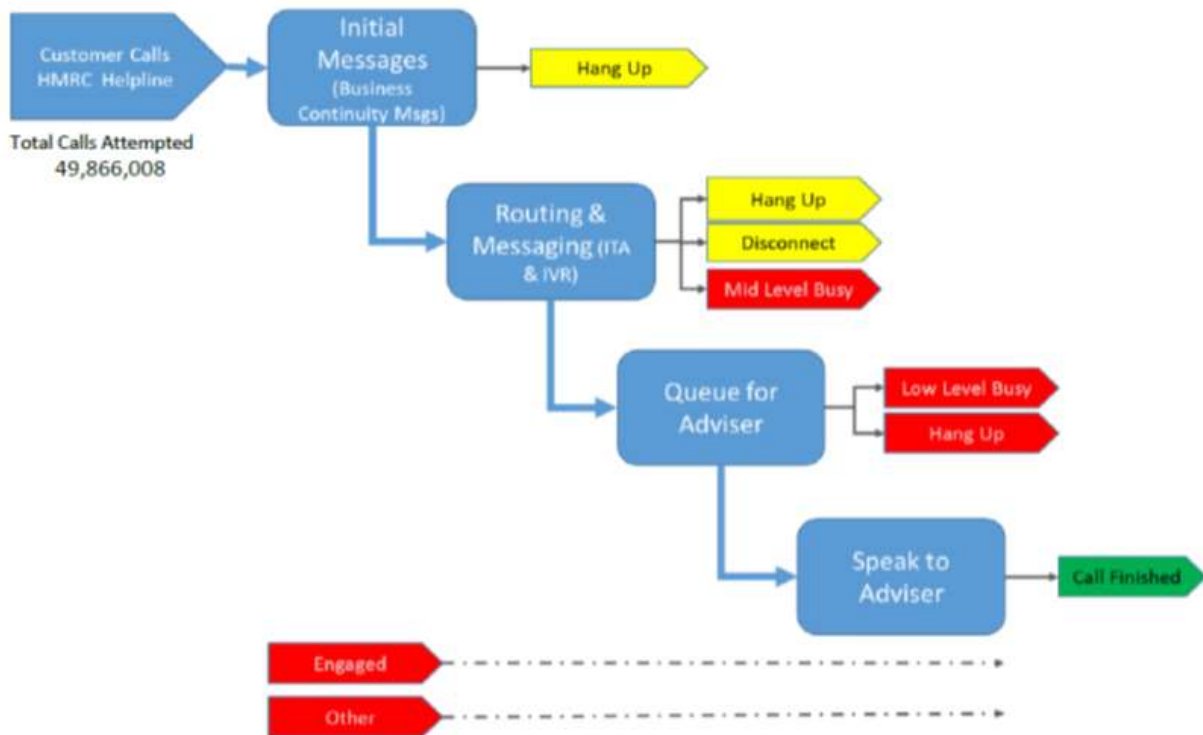## Figure 3.0 – HMRC call routing stages and outcomes

Table 3.0 – HMRC call routing volumetrics 2016-17

Stages and Outcomes	Calls	Total (%)	Handled (%)
Initial messages			
Customer drop	2,873,654	5.8	5.8
Automated routing			
Customer drop	9,251,859	18.6	18.6
HMRC drop	397,440	0.8	
Queue for adviser			
Customer drop	1,915,750	3.8	
HMRC drop	1,020,868	2.0	
Speak to adviser	33,582,806	67.3	67.3
System issues	823,631	1.6	
Calls to helpline	**49,866,008**	**100**	**91.7**

Average Speed of Answer

If, after **initial messages** and **automated routing and messaging,** a customer remains on the line as they would like to speak with an adviser they will enter a **queue for the adviser.** We report on the average time customers spend in this queue before they speak to an adviser, we term this as the average speed of answer. We monitor the volume of calls lost when we are busy and disconnect and when calls are lost due to customers abandoning the queue to ensure these are not impacting average speed of answer performance.

Call Wait Outliers

In addition to the average speed of answer, to ensure we are offering a consistent service to our customers we also measure outliers in our telephony service. This reports the percentage of calls in the **queue for the adviser** that wait more than 10 minutes before the call is answered. We aim to have sufficient staff available to handle our customer calls quickly enough to meet our ASA and call outlier targets. We will begin reporting outliers information from 2017-18.