Helpline & Customer Contact: Final Report

Content

- Discovery goals
- Context & scope
- Who we spoke with
- Findings & observations
- Ideas & opportunities
- Recommendations
- How to move forward

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Context and scope

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Your requirement

The Corporate Service Unit (CSU) run a Helpline and Customer Contact Center for the FSA for both internal and external customers. The service does not current have a tool to support their phone calls and email correspondence and ways of working.

We will conduct a Discovery for this service to determine whether there is evidence for introducing a tool (such as a CRM) to add significant enhancements to the customers of the service.

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Focus areas

The Discovery will allow us to understand **pain-points and opportunities** across

- **Users and their needs** of the Helpline service
- Current **business processes** being operated and would be impacted by the service
- **Existing technology** that would enable the delivery of the service
- Underlying **data** the service would run on

This will focus on creation of a **Service Blueprint** to show **the bigger picture of how the service is operating** and where the **pain points** lie, before deciding which ideas will be taken forward to an Alpha phase if it is recommended to progresses that far.

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Helpline service overview

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Helpline team

"Transactions and Helpline team form part of the Corporate Support Unit, offering both internal and external customers a day to day functional support team. As a public facing team and the main handlers of external customer queries, they coordinate responses with support from specialist teams across the FSA. Internally, offering a multitude of corporate functions to ensure business continuity, predominantly but not restricted to, FSA Operations"

Overall enquiry volumes

Average enquiry volumes are approx. **10.5-12.5k** per annum

Approximate Channel split 2019
52% received via telephone*
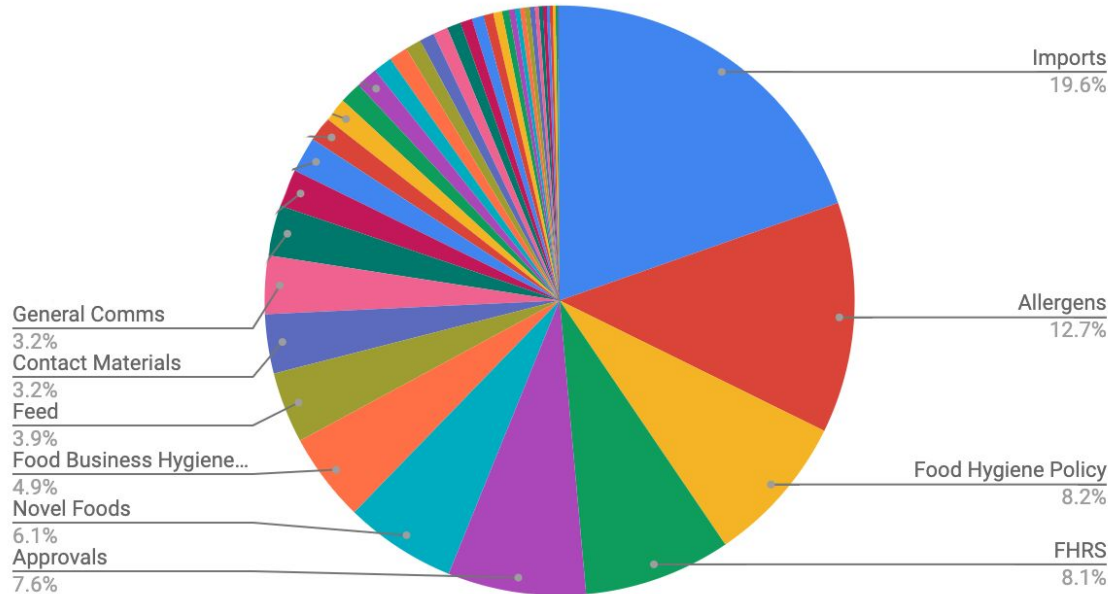48% received via email*

Approximate Channel split 2020
39% received via telephone*
61% received via email*

*stats reliant on human input

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Helpline: reasons for contact 2019

2019 incoming queries recorded in K2 system per topic

Imports 19.6%
Allergens 12.7%
Food Hygiene Policy 8.2%
FHRS 8.1%
Approvals 7.6%
Novel Foods 6.1%
Food Business Hygiene... 4.9%
Feed 3.9%
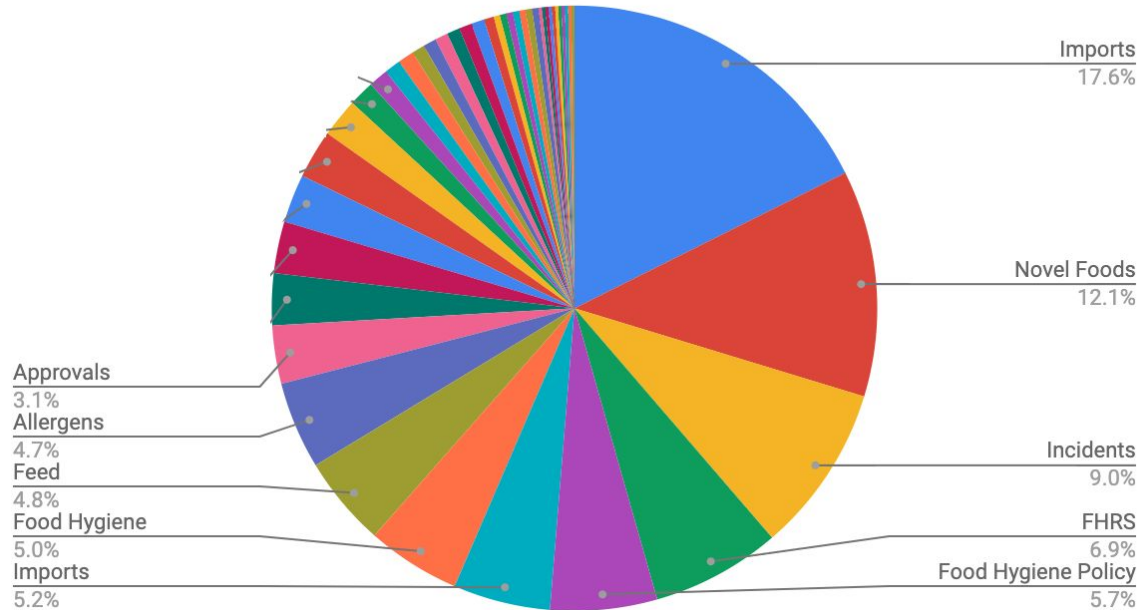**Contact Materials** 3.2%
General Comms 3.2%

Observations / thoughts

- Too many enquiry types (55) for the Helpline team to confidently and effectively answer them all
- Support teams should support Helpline by taking calls
- Helpline service MI is either not available or in its infancy; future MI requirements should be a core consideration for any future iterations of the service

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Helpline: reasons for contact 2020

Jan-March 2020 incoming queries recorded in K2 system per topic

Imports
17.6%

Novel Foods
12.1%

Incidents
9.0%

FHRS
6.9%

Food Hygiene Policy
5.7%

Approvals
3.1%

Allergens
4.7%

Feed
4.8%

Food Hygiene
5.0%

Imports
5.2%

Observations / thoughts

- Top 10 contact reasons in 2020 so far are differ to 2019 - what are the reasons for that?

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Genuine vs non-genuine Helpline calls

April 2019					
TEAM	External Not FSA	External Correct Team	External Other FSA Team	Welsh Speaking	Totals
CSU Helpline	291	60	217	0	568

March 2020					
TEAM	External Not FSA	External Correct Team	External Other FSA Team	Welsh Speaking	Totals
CSU Helpline	93	257	5	0	355

Observations / thoughts
- Despite improvements to IVR, Helpline team are still receiving calls they shouldn't be (down from 50% in 2019 to 10% in 2020)
- Further reductions can be achieved through iteration of the newly revamped IVR as well as review of email service channel

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Who we spoke with during Discovery

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Teams engaged

Approvals Team

NFCU Bureau

FOI, Complaints & Transparency (FCT)

Private Office

Transactions (York)

Communications Team

Helpline (London)

Northern Ireland Business Support Team

Welfare of Animals at Time Of Killing (WATOK)

Wales Business Support Team

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Findings and observations

What's working well

- There is a clear focus on customer experience & providing a high level of service (reflected in the feedback from teams, efforts to improve MI, updates to IVR)
- Support teams understand the pressure & constraints that impact the helpline team and the importance of the need for them to be generalists
- Reminder function configured in K2 to track enquiry resolution, although it's acknowledged this isn't the ideal solution

"They have a tough time and they aren't properly resourced and they are bearing the brunt of it all...people are very critical of them."

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Key user needs

USER + NEED + INSIGHT

01 Enquiries need to be managed from beginning to end in a single place
- So that teams have a single view of a customer's enquiry and do not have to straddle multiple systems

02 Helpline team need to be able to work remotely on the telephone or emails
- So that customers are served regardless of the Helpline team's geographical location

03 Further iterations of call routing options are needed
- So that they can speak to the right team to have their query resolved promptly

04 Helpline need clarity on who to pass enquiries to when they're unable to provide a response
- So that it can be dealt with quickly and efficiently

05 Helpline team need enquiry responses from support teams in reasonable time frames
- So that enquiries are resolved promptly and customers are satisfied with the service they receive

06 Helpline need to know once a support team has dealt with an enquiry
- So that time is not wasted on chasing for a response when it has already been provided

07 Need support teams to take phone calls from the Helpline
- So that enquiries can be dealt with quickly and efficiently through conversation

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Pain points: business process

Observation	Impact
Incoming calls are being routed to the wrong teams	Reduces first contact resolution (IVR & manual transfers). In some cases, customers are forced to hang up and re-dial, resulting in poor customer experience.
Support teams don't handle calls.	Customers aren't talking to the "expert", reducing the quality of service offered (as well as first contact resolution)
It's not always clear which support team should handle enquiries or how to contact that team	Enquiry resolution takes longer than it should
Collaboration during enquiry lifecycle requires manual effort and there is no single view for teams working on enquiries	20 day SLA isn't always adhered to resulting in follow up contacts from customers that are chasing for responses. SLA MI is not deemed accurate due to reliance on human input and relies on looking at data in two systems.
Information relating to incidents is not always provided to the Helpline team in a timely manner	Not having a response to customer enquiries significantly lowers the level of service the Helpline team are able to provide

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Pain points: technology

Observation	Impact
Current technology is fragmented and doesn't support users in delivering a high quality service	Users straddle multiple systems in order to handle Helpline enquiries which increases risk of errors and causes inefficiencies / delays in responding to enquiries.
SLA management is cumbersome (SSRS provides an Excel file which is emailed to the Helpline team)	Creates inefficient working practices & delays in delays in resolving enquiries Requires coordination by the Helpline teams rather than providing the notification to the team the enquiry has been assigned to.
K2 has many strengths, HOWEVER, as a stand alone tool it is not optimised for enquiry management	No ability to manage telephone / email service channels so if phone lines are busy, there are delays in responding to emails.
Telephony system does not provide key business capabilities	There is limited disaster recovery / Business continuity capability and Helpline team are unable to handle calls remotely. Some features (like changes to call routing) cannot be configured remotely.
Existing technology is unlikely to support evolution of Helpline service capabilities	Potential limitations include the inability to achieve service channel blending and prioritisation, difficulty introducing digital service channels & effective MI.

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Pain points: data

Observation	Impact
The underlying enquiry data needed to deliver an effective Helpline service is spread across multiple systems / applications	When Helpline service and support teams can work together, answers are delivered in a more efficient manner
MI is limited in terms of what data is available and the level of detail provided when it is	MI is important in analysing trends, helping you forecast future service needs and solving any problems you identify in the day to day delivery of the Helpline service. It should be used to monitor customer treatment, expectations and outcomes, proactively addressing issues (rather than being reactive).
There is no real time view of performance	Currently, the FSA are unable to react to spikes in email / telephone volumes which means customers could be waiting longer for their call to be answered.

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Service blueprint

https://miro.com/app/board/o9J_kuvn9dc=/

Considerations

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Helpline service context

- Lower volume of helpline enquiries across all channels compared to other organisations of a similar size
- Low volume of staff handling enquiries
- Evolution of FSA Helpline service

Changing customer expectations

Customers have always wanted a friendly, efficient and reliable service but as technology advances, their expectations are continually raised. Convenience and efficiency are more important than ever and they don't just want friendliness; they want to feel like the service has been personalised for them.

More than before customers are more willing to self serve but when they need to speak to somebody, customers want to contact organisations on any device, on a channel of their choosing and expect that to receive information or having issues resolved quickly.

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Ideas and opportunities

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Potential options

1. Helpline Service transformation

Replace telephony system and introduce an enquiry management system ("lite" version) for the Helpline and support teams

- Provides a single platform for improved service channel management, SLA monitoring & collaboration, reducing enquiry resolution times and providing a higher standard of service
- Improved MI for proactive management of the Helpline service

2. Tactical enhancements

Replace telephony system and develop K2 capabilities and extend usage to support teams.

- provides missing capabilities regarding remote working and business continuity / disaster recovery
- Get the best you can out of K2 from both an operational and MI standpoint

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Recommendations

Recommendations: technology

- **Replace the existing Avaya telephony system**
  - Ability to configure remotely (call routing, invocation of emergency closures)
  - Support remote working (fully cloud based solution, softphones, CTI)
  - Ability to blend telephony with other service channels

- **Introduction of a "lite" enquiry management system**
  - Record all enquiry data in a single place
  - Integrate with telephony and other digital channels for a unified user experience
  - Collaborate on enquiries and share information more quickly / easily

- **Consider future technology needs in decision making (helpline service evolution)**
  - Expand on existing requirements (functional requirements, data, user needs)
  - Decision on inclusion, or not, of digital channels (social customer service, web chat etc)
  - Multi-channel blending

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Recommendations: data

- **Define the underlying data needed to deliver an effective Helpline service;**
  - Contact information
  - Enquiry information
  - Operational information (service channels, service levels, escalations, FCR etc)

- **Consolidate customer and enquiry data**
  - Single view of customer enquiry
  - Better collaboration
  - Faster responses and less manual effort during enquiry lifecycle
  - Improved MI

- **Consider future data needs**
  - How to use data to drive service enhancements (repeat contacts, issue identification, resource planning, contact deflection)

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Recommended roadmap

Now (0 - 3 months)

Expand Helpline service requirements

Define key data requirements & MI / service metrics

Implement new telephony system

Create a Request For Proposal (RFP) for enquiry management system

Key benefits
- Organisational vision for Helpline service defined & agreed
- Foundation for future enhancements in place
- Remote working / business continuity capability in place

Soon (3 - 6 months)

Review & select enquiry management system

Deliver enquiry management Alpha for Helpline team & other carefully selected stakeholders

Implement new MI dashboards & reports based on key service metrics

Key benefits
- multi-channel service provision
- unified user interface
- Enhanced MI
- Helpline data access for broader agency stakeholders

Later (6-12 months+)

Extension of Alpha to devolved Helpline & additional support teams

Evolution of multi-channel service engagement to include digital channels

Introduction of self service

Coordination of Helpline enquiries with other public facing teams

Key benefits
- Single platform for all enquiries (UK team, support teams, non-UK teams)
- Inclusion of digital service channels
- Proactive service management (resource planning, service enhancements)

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Evidence & analysis

- Project wiki: https://github.com/notbinary/fsa-hccc/wiki
  - Service blueprint: https://github.com/notbinary/fsa-hccc/wiki/Service-experience-blueprint
  - User needs: https://github.com/notbinary/fsa-hccc/wiki/User-needs
  - Technology pain points and opportunities:
    https://github.com/notbinary/fsa-hccc/wiki/Technology-pain-&-opportunities
  - Data pain points and opportunities:
    https://github.com/notbinary/fsa-hccc/wiki/Data-pain-&-opportunities
  - Enquiry management solutions: https://www.capterra.com/contact-management-software/

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