

## Appendix 2 Helpdesk performance

Introduced the call centre for ESPF in November 2019

### ES Helpdesk service levels for helpdesk services – new measurement approach post April 21

KPI	A	B	C	D
	First time fix	Call answer time	Abandoned call rate	Email response time
Gold	85% of enquiries dealt with at first point of contact	75% of calls answered in 20 seconds	Less than 5% of calls abandoned	100% of emails answered within 3 working days
Silver	80% of enquiries dealt with at first point of contact	50% of calls answered in 20 seconds	Less than 10% of calls abandoned	75% of emails answered within 3 working days
Bronze	70% of enquiries dealt with at first point of contact	30% of calls answered in 20 seconds	Less than 15% of calls abandoned	75% of emails answered within 10 working days
Below Bronze	<70% of enquiries dealt with at first point of contact	<30% of calls answered in 20 seconds	>15% of calls abandoned	<75% of emails answered within 10 working days

Quarterly performance assessed against the scoring mechanism with rectification plan for underperformance including penalty clauses for sustained underperformance.

### Main Helpline for ESPF

Period	First time fix	Call answer time	Abandoned call rate	Email response time
<b>GOLD TARGETS</b>	<b>85%</b>	<b>75%</b>	<b>5%</b>	<b>100%</b>
April 21	96%	53%	5%	100%
May 21	95%	44%	7%	100%
June 21	95%	56%	5%	100%
July 21	91%	43%	9%	100%
August 21	88%	31%	9%	100%
September 21	86%	23%	6%	100%
October 21	80%	37%	2%	100%
November 21	87%	36%	1%	100%
December 21	81%	36%	0%	100%
January 22	83%	39%	0%	100%
February 22	80%	39%	0%	100%
March 22	86%	37%	1%	100%

### Website Helpline (all six Pension Funds until October 21 the ESPF only)

Period	First time fix	Call answer time	Abandoned call rate	Email response time
<b>GOLD TARGETS</b>	<b>85%</b>	<b>75%</b>	<b>5%</b>	<b>100%</b>
April 21	N/A	30%	18%	N/A
May 21	N/A	31%	15%	N/A
June 21	N/A	48%	10%	N/A
July 21	100%	39%	10%	100%
August 21	100%	49%	21%	100%
September 21	100%	67%	6%	100%
October 21	91%	64%	9%	100%
November 21	100%	63%	6%	100%
December 21	100%	76%	2%	100%
January 22	100%	84%	2%	100%
February 22	100%	78%	1%	100%
March 22	100%	76%	6%	100%

### Monthly transaction volumes

Month	Telephone Calls*	Email's Processed	Call Back's	Total
April 21	1,080	287	13	1,380
May 21	855	475	11	1,341
June 21	807	944	15	1,766
July 21	929	1,795	13	2,737
August 21	936	1,329	5	2,270
September 21	858	1,470	8	2,336
October 21	767	1,241	16	2,024
November 21	815	1,206	0	2,021
December 21	513	968	4	1,485
January 22	777	1,175	19	1,971
February 22	797	1,377	17	2,191
March 22	819	1,293	17	2,129
<b>Totals</b>	<b>9,953</b>	<b>13,560</b>	<b>138</b>	<b>23,651</b>

\* Includes any call fielded on the old SCC line.

### Top five reasons for calls

Reason	7/21	8/21	9/21	10/21	11/21	12/21	1/22	2/22	3/22
Self Service Activation	1 <sup>st</sup>	1 <sup>st</sup>	1 <sup>st</sup>	3 <sup>rd</sup>			3 <sup>rd</sup>		4 <sup>th</sup>
Login issues	2 <sup>nd</sup>	2 <sup>nd</sup>	2 <sup>nd</sup>		1 <sup>st</sup>	4 <sup>th</sup>	4 <sup>th</sup>	2 <sup>nd</sup>	2 <sup>nd</sup>
Claim form guidance	3 <sup>rd</sup>	4 <sup>th</sup>	5 <sup>th</sup>	2 <sup>nd</sup>	4 <sup>th</sup>	2 <sup>nd</sup>	1 <sup>st</sup>	3 <sup>rd</sup>	1 <sup>st</sup>
Option guidance – member	4 <sup>th</sup>	5 <sup>th</sup>						5 <sup>th</sup>	
Update Address	5 <sup>th</sup>		4 <sup>th</sup>	4 <sup>th</sup>	3 <sup>rd</sup>	3 <sup>rd</sup>		4 <sup>th</sup>	
Leaver form received		3 <sup>rd</sup>	3 <sup>rd</sup>	1 <sup>st</sup>	2 <sup>nd</sup>	1 <sup>st</sup>	2 <sup>nd</sup>	1 <sup>st</sup>	
Progress check - Actual				5 <sup>th</sup>	5 <sup>th</sup>	5 <sup>th</sup>			
Progress check - Quote							5 <sup>th</sup>		5 <sup>th</sup>
Document / Form enquiry									3 <sup>rd</sup>

We are initiating a possibility of using a Chatbot (robot) as an online support tool to help with FAQ type enquiries.

## Telephone survey

This is a new service starting in December 21.

Questions raised by email within 24hrs of call where a caller says they are willing to complete a short survey:

1. How easy was it for you to contact the Pensions Helpdesk today?
2. How confident are you that your question was resolved or will be resolved in the relevant timelines?
3. Based on your recent experience how strongly would you recommend using the Helpdesk to a colleague?
4. How satisfied were you with your overall experience today?

Question No.	1	2	3	4
Star Rating	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
December 21	0 0 0 4 23	1 1 0 5 20	1 0 1 4 21	0 2 1 2 21
January 22	1	0	1	4
February 22	1	1	0	5
March 22	0	2	1	2

*Note: 5 Star is the highest and therefore best rating*

An additional question was asked about how many times have your called in connection with your enquiry?

Month	First Call	Second Call	Third Call	Fourth or more
December 21	17	4	2	4
January 22	44	9	3	3
February 22	21	4	2	0
March 22	25	12	0	2

An example of some recent positive feedback the helpdesk received earlier this month:

*“I would like to thank the helpdesk for the assistance given to me over the last year while I made my decision to retire and take my pension early. From yourself in initially helping me set up my portal login, and to all the other phone operators I have spoken to. It was so useful to be able to speak directly on the phone to such knowledgeable, helpful and patient operators. Also not to be fobbed off by recorded messages to go to a website for information, which is often the case these days and can be very stressful when dealing with such important, life changing matters as your pension.*

*Today I had excellent customer service from Virginie who explained how I complete the claim form. She was pleasant, patient, clear and went through the form with me.*

*I value this enormously.”*