

Appendix 4 Helpdesk performance for last 12 months

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
GOLD TARGETS	85%	75%	5%	100%
April 23	87%	82%	1%	100% < 3 days
May 23	87%	88%	1%	100% < 3 days
June 23	85%	92%	0%	100% < 3 days
July 23	87%	93%	0%	100% < 3 days
August 23	89%	92%	0%	100% < 3 days
September 23	85%	93%	1%	100% < 3 days
October 23	85%	91%	1%	100% < 3 days
November 23	92%	76%	1%	75% < 3 days
December 23	89%	85%	1%	75% < 10 days
January 24	90%	67%	4%	75% < 10 days
February 24	87%	73%	2%	75% < 10 days
March 24	90%	73%	3%	75% < 3 days

Note: In Nov 23 the pensioner mailing about online comms becoming a default creating a significant spike in both calls and written communications. In Dec 23 one team member retired and one team member moved to bank support.

Website Helpline

Period	First time fix	Call answer time	Abandoned call rate	Email response time
GOLD TARGETS	85%	75%	5%	100%
April 23	100%	66%	2%	100%
May 23	100%	60%	3%	100%
June 23	100%	82%	2%	100%
July 23	100%	72%	2%	100%
August 23	100%	79%	3%	100%
September 23	100%	78%	2%	100%
October 23	85%	70%	2%	100%
November 23	92%	49%	10%	75% < 3 days

December 23	89%	60%	4%	75% < 10 days
January 24	90%	49%	9%	75% < 10 days
February 24	92%	53%	7%	75% < 10 days
March 24	93%	60%	5%	75% < 3 days

Monthly transaction volumes

Month	Telephone Calls	Email's Processed	Call Back's	Total
April 23	1,024	1,114	6	2,114
May 23	1,157	1,561	10	2,728
June 23	934	1,441	15	2,390
July 23	969	1,352	9	2,330
August 23	1,027	2,005	15	3,047
September 23	819	1,486	17	2,322
October 23	915	1,470	12	2,397
November 23	1,882	1,827	10	3,719
December 23	875	1,165	2	2,042
January 24	1,893			
February 24	1,567			
March 24	1,455			

Top five reasons for calls

Month	Self Service Activation	Login issues	Claim form guidance	Leaver form received	Document or Form enquiry	Other
Jul 23		3 rd	1 st	2 nd	4 th	5 th
Aug 23	1 st	2 nd	4 th		5 th	3 rd
Sep 23	2 nd	1 st	4 th		3 rd	5 th
Oct 23	5 th	1 st	4 th		2 nd	3 rd
Nov 23	2 nd	3 rd	5 th		4 th	1 st *
Dec 23	2 nd	3 rd	5 th		4 th	1 st *
Jan 24	2 nd	3 rd	4 th		5 th	1 st *
Feb 24	3 rd	2 nd	5 th	4 th		1 st *
Mar 25		2 nd	3 rd	4 th	5 th	1 st *

* pensioner opt-out of online comms (received approx. 10k requests)

Telephone survey

Quarter 1, 2024	1 Star	2 Star	3 Star	4 Star	5 Star
1. How easy was it for you to contact the Pensions Helpdesk today?	3	8	33	87	520
2. How confident are you that your question was resolved or will be resolved in the relevant timelines?	8	17	22	99	505
3. Based on your recent experience how strongly would you recommend using the Helpdesk to a colleague?	6	9	34	79	523
4. How satisfied were you with your overall experience today?	11	19	36	74	511
5. How many times have you called the helpdesk about the request / issue?	Once = 503	Twice = 85	Three = 42	Four+ = 21	