

Appendix 2

Helpdesk performance (all six funds) Currently about 2 FTE allocated to ESPF (team is 14).

Introduced the call centre for ESPF in November 2019 (not taken on managing the corporate email box).

Period	Offered (Calls received)	Handled (Calls answered)	Abandoned (Caller hung up)	Aband %	SLA % (75% of calls within 20 seconds)	Queue %	Abandoned Time
01/04/20 to 30/06/20	3,953*	3,381	572	14.5%	Apr 52% May 40% Jun 9%	Apr 42% May 55% Jun 88%	Apr 4.59 May 6.59 Jun 7.10
01/07/20 to 30/09/20	7,300*	6,051	1,249	17.1%	Jul 22% Aug n/a Sep 24%	Jul 74% Aug 81% Sep 73%	Jul 6.42 Aug 7.57 Sep 6.19
01/10/20 to 31/12/20	6,881*	5,975	906	13.2%	Oct 22% Nov 32% Dec 32%	Oct 75% Nov 64% Dec 63%	Oct 7.11 Nov 5.54 Dec 6.44
01/01/21 to 31/03/21	9,719*	8,299	1,420	14.2%	Jan 12% Feb 21% Mar 48%	Jan 86% Feb 76% Mar 49%	Jan 6.35 Feb 6.51 Mar 4.19

* Since lockdown the telephone service opening times has been restricted (with NO back-up – phone line is only open from 10am to 2pm and 2pm to 4pm). First few months there was no call recording and logging was inconsistent. All staff did not initially have laptops and only got Jaba software from June 2020.

Following ongoing challenge from East Sussex PAT the telephone opening times are being reverted back to the pre-pandemic opening times of 9am to 4pm from April 2021.

Helpdesk (website) performance

Period	Calls received	Handled	Abandoned	Abandoned %	SLA %	Queue %	Abandoned Time
01/04/20 to 30/06/20	1,320	871	449	34.02%	Apr 28% May 28% Jun 0%	Apr 43% May 56% Jun 75%	Apr 2.59 May 2.27 Jun 4.13
01/07/20 to 30/09/20	1,032	926	106	10.27%	Jul 1% Aug n/a Sep 39%	Jul 41% Aug 46% Sep 26%	Jul 4.45 Aug 3.28 Sep 1.37
01/10/20 to 31/12/20	451	362	89	19.73%	Oct 37% Nov 32% Dec 37%	Oct 35% Nov 39% Dec 32%	Oct 1.54 Nov 4.57 Dec 6.14
01/01/21 to 31/03/21	529	435	94	17.77%	Jan 17% Feb 43% Mar 53%	Jan 60% Feb 24% Mar 19%	Jan 3.29 Feb 2.19 Mar 2.36

ESCC Pension Helpdesk Planned Improvement Actions

Ref.	Action	By when	Status / Update	Next steps	Owner (s)
1	Remove backlog of emails currently impacting resource availability	05-Mar-21	Email backlog reduced from >1,000 down to 170 (15th Feb). Whilst additional resources have been brought in, we have also had to divert some BAU resource into managing the back log. Did not achieve target to clear by the end of February. 13.04.21 Backlog cleared. Working to 3 working day response time.	Continue to monitor	Beth Evans
2	Increase resources available to manage MSS enquiries. Upskill agents to become fully self sufficient.	12-Mar-21	5 new agents have been trained and are now handling email enquiries. The original aim was for these agents to be fully self sufficient by the end of January but lockdown has meant upskilling is taking longer than planned so they are continue to be supported. All 5 agents now taking calls on main line and MSS line with minimal support	Continue to train and support agents to the point where they are self sufficient	Beth Evans
3	Increase resources available for telephone enquiries. Upskill agents to become fully self sufficient.	01-Apr-21	Training on calls is underway with close supervision and support provided by experienced agents through remote call listening. Impact on current performance c50%. Gradual uplift expected over next 6 weeks through to all 5 agents being self sufficient by 1st April. 14.04.21 - All agents are self sufficient.	Monitor agent performance and impact on telephone response stats.	Beth Evans
4	Establish a bank of trained workers available to supplement core team as required.	On going	We now have a pool of trained bank workers to bring in during peaks.	Forward planning for peak or transitional resource requirements	Beth Evans / ESCC
5	Establishing weekly performance review from w/c 15th February.	On going	Weekly reviews in place until further notice		Michelle Marshall

ESCC Pension Helpdesk Forward Plan Actions

Ref.	Action	By when	Status / Update	Next steps	Owner (s)
6	Develop transition plan for take on of ESCC emails, subject to formal approval.	05-Mar-21	Outline plan and proposed timescales to be agreed in advance of formal approval following Pensions Board (15/2) and Pensions Committee (1/3).	Agree outline plan and timescales. Formalise once approval received. Review plan and arrange interim transfer of emails	Michelle Marshall / ESCC
7	Implement transition plan.	30-Jun-21	Once approval is received, plan is to recruit 2 x FTE with 1 x FTE available from current team to respond to emails from 1st April and full transition to BAU achieved over 3 months to end June 2021. Closing date for advert 25.06.2021. Aim to bring new agents in for 1st April 2021. 3 new agents started on 06.04.21. Training is now underway with support from senior and more experienced agents. Training being carried out in the office and remotely. Aim to handling enquiries with minimal support by 01.07.21	Prepare and implement detailed plan actions. Interview scheduled for w/c 1st March Successful candidates will be offered role on 9th March Monitor agent performance and impact on service levels	Michelle Marshall / ESCC
8	Create senior agent position in helpdesk team	01-Apr	This will provide more support for Beth with training/coaching and role will be to focus on complex ESCC enquiries. Act up current agent and backfill in recruitment round.	Complete	Michelle Marshall
9	Increase availability of telephone opening hours in line with WTA	01-Apr-21	All set up with BT for lines to be open 9 - 4 from 01 April	Complete	Beth Evans
10	Develop email tracking methodology to measure performance vs KPI in WTA	TBC	With automation team to develop an automated count bot to have better insight to email volume and timings.	Will be measured manually from 1st April 2021 until automation is in place	Michelle Marshall
11	Set up and migrate to new ESCC Pension Fund number	01-Apr	New line for ESCC enquiries 0300 200 1022 to be available from 1st April. Telephone line went live on 1st April and reports set up so can monitor ESCC line separately	Set new line up up & record messages. Work with ESCC team to create comms plan for new number. Manage transition from current shared number. IVR press button option requested to route ESCC customers to the new line. New IVR go live Monday 15th March. Daily reports to be set up and tested by 20.03.21 Complete	Beth Evans / ESCC
12	Add helpdesk customer feedback stats to monthly reports	01-Mar	Monthly report already sent monthly feedback on pensions admin team. This will show customer feedback results for helpdesk.		Michelle Marshall
13	Work collaboratively on ABS comms	01-Mar	Helpdesk team member to be included in project/attend meetings	Bi-weekly meetings set up with Tim Hillman	Michelle Marshall

ES Helpdesk service levels for helpdesk services post April 21

KPI	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 with 3 working days

- There will need to be a three months' notice lead in period, to allow the team to expand and train the team.
- Then live but with a three months' shadow period to adjust to the required higher standards where we will not apply performance penalties
- Thereafter quarterly performance assessed against the scoring mechanism with rectification plan for underperformance including penalty clauses for sustained underperformance.

Task	Duration	Start	Finish	Description	Proposal	Status	Update	Resource names
Recruitment	6 weeks	24.02.2021	06.04.21	Onboarding process started. Aim to have 3 new agents start on 6th April		Complete	3 agents started on 6th April. Training on schedule and will be handling enquiries unsupported by July 2021	Michelle Marshall Beth Evans
Email Discovery phase	1 week	15.03.21	19.03.21	Set up meeting with ESCC admin team to agree:	Continue to allocate emails as we do currently with WCC enquiries*	Delayed	SCC staff cannot access ESCC inbox without being set up as ESCC staff. Access being arranged by IT&D Meeting set up for 20.04.21 Discuss proposal for interim manual transfer of emails. Access to group email in progress - with IT&D	Julie Pelham Jennie Shuttleworth Tammie Beer Gemma Hamond Amanda Cutter Beth Evans Michelle Marshall
				•How we will handle the emails				
				•How we will escalate to 2nd line during transition	Suggest that emails selected in date order and moved into separate folder each week.			
				•Access to group email	IT&D			
Transition phase	3 months	06.04.21	01.07.21	Helpdesk to handle specific number of ESCC emails each week from Tuesday 6th April.	Senior helpdesk officer, Amanda Cutter to be responsible for handling email enquiries and escalations within the team. The transition phase to be used to build relationship with senior ESCC officers	Delayed	Delayed as above	Tammie Beer Gemma Hamond Amanda Cutter Beth Evans
				6th April -16 April: 50 emails				
				19 th April- 3th April- 80 emails				
				Review before agreeing next increase	3rd May - 28th May: 100 emails each week 31st May - 30t June: 150 email each week	Delayed		Paul Punter Michelle Marshall Beth Evans
Training	3 months	06.04.21	01.07.21	Create training plan for new agents	Plan carefully so that we have still have senior agents to support the team and experienced agents handling ESCC enquiries.	Complete	Training is underway	Michelle Marshall Beth Evans
* 1. The helpdesk agents will respond to queries where they can and set up tasks to be allocated 2. When there is a task that's involved or being queried with someone's name on we will refer to them directly for further guidance 3. If the task needs allocating we will emails Julie/ Jenny.								