

Appendix 2

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

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%
October 22	85%	47%	8%	68%
November 22	82%	73%	1%	60%
December 22	85%	92%	0%	66%
January 23	87%	86%	1%	97%
February 23	84%	88%	1%	96%
March 23	86%	86%	1%	100%
April 23	87%	82%	1%	100%
May 23	87%	88%	1%	100%
June 23	85%	92%	0%	100%
July 23	87%	93%	0%	100%
August 23	89%	92%	0%	100%
September 23	85%	93%	1%	100%

Website Helpline

Period	First time fix	Call answer time	Abandoned call rate	Email response time
GOLD TARGETS	85%	75%	5%	100%
October 22	100%	51%	15%	70%
November 22	95%	51%	5%	100%
December 22	100%	69%	0%	100%
January 23	100%	80%	2%	100%
February 23	100%	77%	2%	100%
March 23	100%	76%	1%	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%

Monthly transaction volumes

Month	Telephone Calls	Email's Processed	Call Back's	Total
October 22	736	1,050	17	1,803
November 22	513	1,660	25	2,148
December 22	518	875	6	1,399
January 23	1,064	1,302	15	2,381
February 23	923	1,308	10	2,241
March 23	1,077	1,439	13	2,529
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

Top five reasons for calls

Month	Self Service Activation	Login issues	Claim form guidance	Option guidance – member	Update Address	Leaver form received	Progress check - Actual	Progress check - Quote	Document or Form enquiry	Other
Oct 22		3 rd	2 nd	4 th		1 st			5 th	
Nov 22	4 th	3 rd	2 nd		5 th				1 st	
Dec 22	4 th	5 th	2 nd			3 rd			1 st	
Jan 23	1 st	2 nd	4 th		3 rd				5 th	
Feb 23	4 th	2 nd	1 st			3 rd			5 th	
Mar 23	2 nd	3 rd	1 st			4 th				5 th
Apr 23	5 th	2 nd	1 st		3 rd				4 th	
May 23	1 st	2 nd	3 rd		4 th					
Jun 23	5 th	2 nd	1 st		3 rd					4 th
Jul 23										
Aug 23										
Sep 23										

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

Telephone survey

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
October 22	N/A	N/A	N/A	N/A
November 22	0 0 0 2 6	0 0 0 2 6	0 0 0 1 7	0 0 1 1 6
December 22	0 0 0 3 54	0 1 3 9 44	1 0 2 5 49	1 1 1 8 46
January 23	1 1 7 10 98	3 4 6 21 83	0 5 2 16 91	1 6 1 19 92
February 23	0 0 6 25 96	7 3 12 18 87	2 5 11 12 97	2 4 15 13 93
March 23	1 0 6 18 112	7 3 10 22 95	1 5 8 18 104	1 5 8 18 105
April 23	1 3 5 13 76	10 1 11 13 64	3 3 9 14 69	5 3 10 13 67
May 23	0 17 18 136	8 5 8 31 110	3 4 7 19 127	3 7 8 18 125
June 23	2 1 2 11 85	7 2 6 16 70	6 2 1 13 78	7 1 4 13 75
July 23	1 0 2 9 101	5 5 4 14 85	5 2 3 12 91	5 4 3 11 88
August 23	0 1 8 18 126	3 2 15 15 118	2 3 8 20 120	2 5 7 17 120
September 23	0 1 3 14 94	5 4 5 17 81	2 4 4 18 84	2 7 3 17 83

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
October 22	N/A	N/A	N/A	N/A
November 22	?	?	?	?
December 22	40	12	2	3
January 23	99	11	7	1
February 23	91	26	6	4
March 23	100	29	3	6
April 23	82	14	1	2
May 23	131	18	10	3
June 23	79	9	5	8
July 23	84	17	5	6
August 23	113	29	5	6
September 23	82	20	6	4

The Surrey Pensions Helpdesk was taken in-house from 25 November 2022.

ESPF have agreed to bring the Pensions Helpdesk in-house on 1 April 2024.