

Consumer service Transition - Trading Standards Workshops

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November 2016

Aims for the Day

- The purpose of the workshop session is to communicate the key messages regarding the Transition of the Citizens Advice consumer service in England and Wales into the Citizens Advice network.
- An opportunity to engage with our key partners around how we interact with you, and outline the future of the service
- Answer questions and address any concerns raised

Overview

During our session today we plan to cover

- A summary of how the service is currently delivered
- Detail on our interaction with trusted partners
- Partner Satisfaction
- Service transition - overview and timelines
- Transition performance and quality
- Transition Communication Plans
- Trading Standards feedback on selection process
- Speaker from a new delivery centre
- Service Development opportunities
- Q & A

Citizens Advice consumer service - introduction

The Citizens Advice consumer service provides advice and information to clients on problems and issues with goods and services:

- Funded by the Department of Business, Energy & Industrial Strategy (BEIS) - formerly Business Innovation and Skills (BIS)
- GB wide service delivered in partnership with Citizens Advice Scotland
- Clients receive practical advice and information on the relevant consumer legislation and how to resolve the issue
- The service collects data and intelligence that is shared with you to facilitate your role in the wider consumer landscape

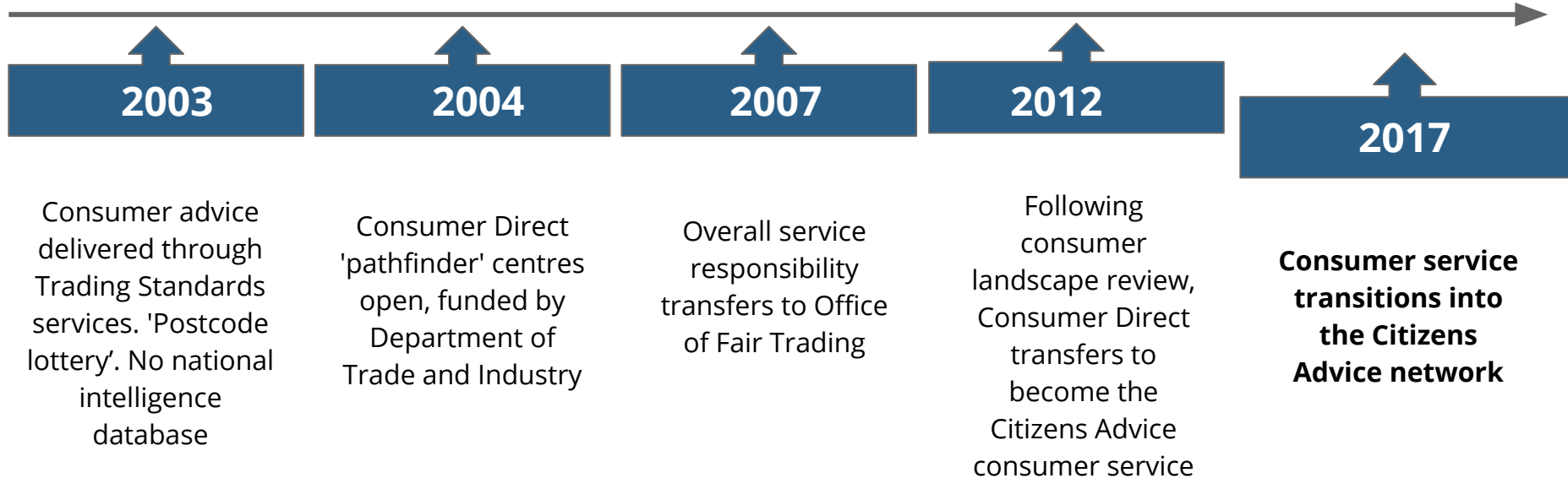
Scope of the consumer service

Within scope	Outside scope
Pre-shopping advice to help protect against issues	Face-to-face advice
Information about consumer rights & industry regulations	Recommendations on specific products/services
Practical next step advice on resolving disputes	Mediating disputes between clients and traders
Advice on Alternative Dispute Resolution (ADR)	Acting on behalf of clients
Referrals to partners for support, where offered	Case work or more in-depth advice
Signposting to other consumer organisations	Advice on specialist consumer areas (e.g. finance)
Signposting to local Citizens Advice	Advice on other areas provided by Citizens Advice

Consumer service operating model

- Inbound service - hours are 9am - 5pm, Monday to Friday
- Dedicated Welsh language service with translation services available by phone for other languages
- Webforms available via public website
- Currently delivered by two suppliers - Agilisys in England and Wales and Citizens Advice Direct in Scotland (in conjunction with Citizens Advice Scotland)
- Service is complemented by resources and information on the Citizens Advice website
- Advice is provided on all general consumer, energy and post issues
 - Inbound telephone service (approx. 91% of contacts)
 - Webforms (approx 8% of contacts):
 - General consumer, energy and post
 - Letters (<1% of contacts)
 - for energy and post issues only

Consumer service - Background



2003

Consumer advice delivered through Trading Standards services. 'Postcode lottery'. No national intelligence database

2004

Consumer Direct 'pathfinder' centres open, funded by Department of Trade and Industry

2007

Overall service responsibility transfers to Office of Fair Trading

2012

Following consumer landscape review, Consumer Direct transfers to become the Citizens Advice consumer service

2017

Consumer service transitions into the Citizens Advice network

Consumer service - statistics

Service statistics:

- Over **1 million** contacts were answered in total in 2015/16
- We answered **95%** of calls offered to the service in 2015/16
- We passed over **200,000** referrals to Trading Standards, and more than **12,000** to other referral partners
- **82%** of clients were satisfied or very satisfied with the consumer service in 2015/16
- We also signpost consumers to other appropriate agencies, including local Citizens Advice offices

Where we are currently delivering the service

Delivered in conjunction with Citizens Advice Scotland (CAS) via 5 contact centres:

- Barrow-In-Furness, Cumbria
- Weston-Super-Mare, Somerset
- Cwmbran, Wales - Welsh Language line
- Stornaway, Isle of Lewis
- Glasgow

In excess of 150 fully trained advisers are employed to deliver the service.



Interaction with Trusted Partners

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Consumer service - partners

The consumer service has relationships with a significant number of partners, including Trading Standards.

We interact with each other in a number of ways, including:

- Referrals
- Feedback
- Duty
- Partner Satisfaction
- Performance dashboards
- Meetings , working groups and conferences

These interactions help us ensure we continue to meet the needs of our partners and add value to the consumer service more widely

Consumer service support - day to day

We are involved in a range of activities which support the day to day running of the consumer service. A Duty Officer is available during service hours to deal with any operational queries: **0300 5000 922** / operations@citizensadvice.org.uk. Daily activities include:

- Liaising with partners regarding referral feedback
- IT System support and administration
- Operational support in the event of unforeseen issues
- Collaboratively altering partner protocol documents
- Tracking traders to provide intelligence to partners
- Supporting the handling of complaints
- Handling DPA and FOI requests
- Liaising with centres and Press Office regarding topical consumer issues

Feedback process

We value partners feedback to allow us to continually develop and improve our service. There is a KPI regarding the level of feedback on referred cases, and this is managed through an agreed process with partners to promote consistency:

- Forms are sent to the duty officer for review
- If urgent matters arrive partners are supplied with a telephone number for the centre if needed
- The process allows partners to submit concerns in a structured manner
- Trend analysis is undertaken by suppliers on a regular basis
- Demonstrates service commitment to corrective actions
- Positive feedback also encouraged to pass on to advisers

Working Groups

- **Trading Standards Working Group**
 - Held quarterly
 - Representatives from each region attend, along with BEIS and the Scottish Government
 - Discuss service performance and trends, the wider landscape and other topical issues
- **Energy Partner Liaison Meeting**
 - Held quarterly
 - Representatives from energy suppliers, along with the Extra Help Unit, BEIS, Ofgem and other stakeholders
 - Discuss service performance and trends and the manner in which the industry meets clients needs
- **Postal Operator Liaison Meeting**
 - Held twice a year
 - Representatives from postal operators suppliers, BEIS, Ofcom and other stakeholders
- Attend regional meetings upon request, where resource allows

Referral partners

- Trading Standards
- Energy and Post suppliers
- Citizens Advice Scotland's Extra Help Unit, who accept referrals and assist vulnerable clients in the energy sector
- ADR schemes as certified by appropriate Competent Authorities

Each of these organisations receives individual case data, in prescribed circumstances as dictated by their own individual referral protocol, which is stored on one of the systems the advisers have access to.

General consumer data is also available to partners through our partner portal in line with data sharing agreements.



Partner Portal - Reports



[Home](#) / [Reports](#)

CDW Reports

Report	Description	Created	Last Modified	Roles	Action
CA01 - Survey Details (GC)	CA01 - Survey Details (GC)	Jan 11 2015 - 00:00:00	Jun 11 2015 - 16:06:38	CA, ...	Edit
CA02 - Data Accuracy By Region	CA02 - Data Accuracy By Region	Jan 11 2015 - 00:00:00	Jun 05 2015 - 08:35:15	CA, ...	Edit
CA02 - Data accuracy by region - Source data	CA02 - Data accuracy by region - Source ...	Jan 01 2015 - 16:38:19	Jun 05 2015 - 08:34:03	CA, ...	Edit
CA16 - Operational Management	CA16 - Operational Management	Jan 11 2015 - 00:00:00	Sep 15 2015 - 11:59:54	CA, CivicaTest, ...	Edit
CA16 - Operational Management TEST	CA16 - Operational Management.rdl	Jun 01 2015 - 00:00:00	Jun 01 2015 - 00:00:00		Edit
CA22 - All Cases For Analysis	CA22 - All Cases For Analysis	Jan 12 2015 - 00:00:00	Jun 05 2015 - 12:51:09	CA, ...	Edit

Partner Satisfaction

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Partner engagement strategy

Partners can interact with the service in a number of ways:

- Interaction with the duty officer
- Feedback on cases received by partners
- Trader tracking requests with instructions for advisers to follow
- Partner dashboard
- Obtaining information on the service through our partner pages
- Accessing the partner portal
- Attending centrally managed and hosted working groups
- Attending regional working groups
- Contributing to consumer service projects

Partner Satisfaction

Partner satisfaction is measured in 2 ways:

- A performance measure that no more than 2% of cases that are referred should need to be feedback because they are incorrect
- A biannual in-depth survey conducted with partners using an online tool with an overall satisfaction level of 70%

Partner satisfaction survey

The Partner satisfaction survey measures feedback in the following areas:

- Citizens Advice as a delivery partner overall
- How the contact centre suppliers interact with partners
- The performance of the Citizens Advice consumer service operations team
- How referrals and feedback are managed
- The application and compliance of trader tracking requests by advisers
- Experience of accessing data through the partner portal

We collate a report summarising the results and appropriate engagement and development activities following the publication of each survey

Partner satisfaction survey - results

		Wave 5 - May 2016
General	Satisfied with consumer service as a delivery partner	81%
	Satisfied with accuracy of information to consumers	79%
	Satisfied with depth of advice to consumers	66%
	Satisfied with quality of case notes	45%
	Satisfied with information around traders and suppliers	56%
Contact centres	Satisfied with support provided by CAD contact centres	89%
	Satisfied with support provided by Agilisys contact centres	79%
Operations team	Satisfied with training	71%
	Satisfied with the duty officer	96%
	Satisfied with IT support	95%
	Satisfied with engagement	92%

Service transition - Overview and timelines

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Transition overview

Following a review of the consumer landscape, in 2012 responsibility for the delivery of the consumer service passed from the Office of Fair Trading (OFT) to Citizens Advice and Citizens Advice Scotland. The review recognised that these new arrangements would:

- strengthen frontline consumer protection by forging a stronger link between the activities of the Citizens Advice service and provision of information and advice
- move the delivery of advice to a service with a brand that is much better known to consumers than the Consumer Direct service delivered by the OFT
- reduce the complexity of the consumer landscape

Transition overview

After what will have been 5 years of successful delivery, the contract we have with our current contact centre supplier, for services across England and Wales, will come to an end.

Since the transfer of the service from the Office of Fair Trading, it has always been the long-term goal of Citizens Advice to integrate the consumer service into our wider network and we are now realising this aim through the service transition project.

The relationship between Citizens Advice Scotland and their contact centre supplier, Citizens Advice Direct, is unaffected.

Transition overview

There are a number of benefits to progressing this integrated approach including:

- the ability to seamlessly link clients to advice and support in other areas they may require, for example debt advice
- an increased potential for greater regional engagement with Trading Standards, and other partners and stakeholders
- integrating the knowledge and expertise of the wider Citizens Advice network into the consumer service and building stronger relationships
- greater opportunities for shared ownership of the service by delivery partners, who are part of our service, meaning that the provision of a good quality service to clients and partners will continue to be a priority

Transition overview

We have, therefore, taken the decision that from April 2017 the consumer service in England and Wales will be delivered by a small number of Citizens Advice providers.

We have remained in regular contact with the Department of Business, Energy and Industrial Strategy (BEIS) and they support our approach and have clear expectations that the service will be delivered to at least the same scope and operational standards, dependent on funding.

Our priority in making this transition will be to maintain service levels and quality, and we will make as few changes as possible to the current delivery model (including retaining existing systems, data fields and protocol and data sharing arrangements) to ensure a smooth transition.

We do, however, want to continue to improve and develop the service and these improvements will be made in discussion with you and phased in over time.

Delivery model

Site	Channels	Services
Gateshead	Telephone, Webform	General Consumer, Energy, Post
Manchester/Sheffield	Telephone, Webform	General Consumer, Energy, Post
Caerphilly	Telephone, Webform	General Consumer
Cardiff	Telephone, Webform	General Consumer
Staffordshire North	Telephone	General Consumer
Torfaen	Telephone	General Consumer
West Lindsey	Telephone	General Consumer
Cardiff	Telephone, Webform	General Consumer, Energy, Post, Welsh Language

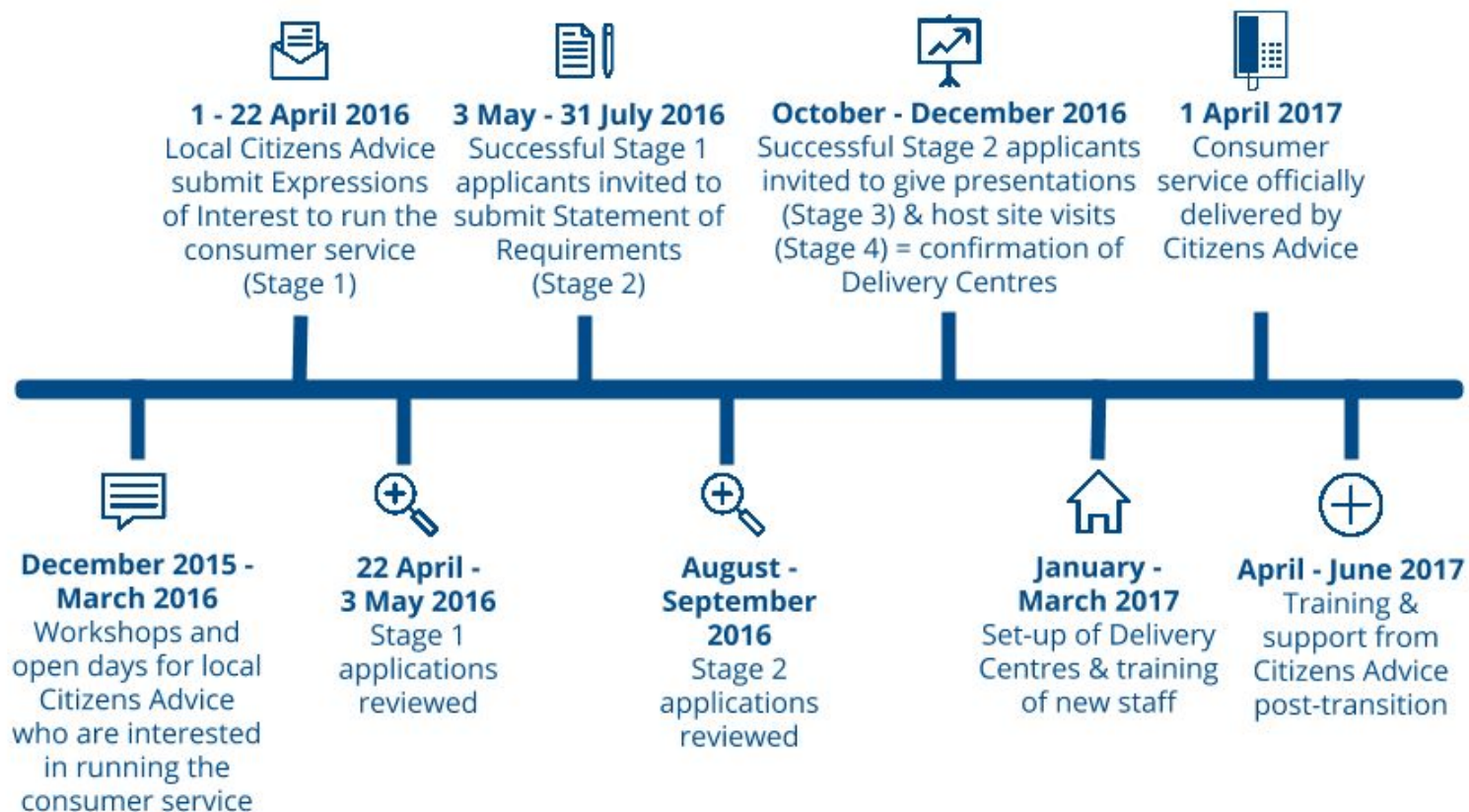
Application process

We have put in place a detailed set of requirements for the service, and invited the Citizens Advice network to express interest in working with us by defining how they will meet these.

A process has four stages:

- **Stage One** - administrative information and evaluation of current work with Citizens Advice
- **Stage Two** - statement of requirements and experience of previous service delivery
- **Stage Three** - presentation to a panel (including Trading Standards representatives)
- **Stage Four** - site visits

Timeline



Service transition - Performance and quality

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Overview

Service performance and quality remains the highest priority for the service during transition and we have committed to both BEIS and partners to maintain the same performance measures as we have currently.

We will achieve this by:

- Working closely during implementation with each new delivery centre to ensure they understand the performance requirements
- Sharing best practice and encouraging open dialogue between centres
- Introducing additional quality tracking measures throughout implementation
- Utilising the skills, knowledge and accumulated experience of our existing supplier

Training

	General Consumer	Energy	Post
Legal concepts and the consumer landscape	✓	✓	✓
Contract law	✓	✓	✓
Information and cancellation rights	✓		
Legal protection when buying goods and services	✓		
Credit	✓		
Holidays and package travel	✓		
Distance contracts	✓		
The energy industry		✓	
Marketing energy		✓	
Energy supply contracts		✓	
Fuel measurement and payment		✓	
Connection and quality of supply		✓	
Debt and disconnection		✓	
Postal services			✓

Training

We have committed to ensure all new advisers to the service are trained and assessed by accredited trainers prior to go-live.

We will also attend each site to provide more specialist training to managers relating to consumer service processes, including quality monitoring, performance management and complaint management.

Partner specific processes, such as feedback, protocols and referrals will also be embedded to ensure consistency of approach and a continued high quality partner experience.

Training

We will track proof of learning and end of training assessment scores and analyse these for any evidence of advisers not understanding key areas of legislation.

Where gaps are identified we will work in conjunction with the learning teams at the new delivery centres to produce additional training and coaching content.

We will also embed a Training User Group, to ensure best practice is shared and consistency across sites is achieved.

Quality

- Quality of advice is of paramount importance to the consumer service
- Framework in place to allow monitoring of all subject areas, across all channels
- All telephone calls are recorded, to facilitate retrospective quality monitoring
- The KPI for quality is 70% of reviewed cases classified as 'Good' overall
- Suppliers monitor a number of contacts per month, and then we re-review a proportion of these to confirm their final monthly KPI result

In addition to quality reviews, the role of the quality team includes:

- Regular internal and external benchmarking
- Quality guidance review and development
- Trend analysis and reporting from results
- Suggesting Adviser feedback and/or areas for training
- Oversight of the quality user group

Quality

The key principles of the quality framework are:

- Objectivity
- Consistency
- Accuracy
- Realistic expectations
- Drive improvement

Our focus during Transition will be to maintain and drive quality in each new delivery centre, working closely with each management team to set expectations and provide support.

Quality

Questioning	Sufficient information obtained to allow for accurate advice, identification or potential referrals and collection of supporting information
Advice	Accurate legal advice, clear next steps, additional advice offered, realistic expectations of service and partners set
Customer Service	Appropriate pitch, pace and tone, good structure, impartiality, acceptable contact open and close, adherence to business processes
Data Quality & Referrals	Accurate recording and coding of case, including full and representative case notes

Quality

- Full monthly reporting of quality results to suppliers
- Process includes monitoring of consistency of marking
- Timely submissions of requested case information are also monitored

	Overall results	Marking Tolerance	Boundary disputes	Benchmarking status	Submission compliance
August	71%	6%	4	1	100%
September	73%	14%	2	1	75%
October	70%	10%	7	1	100%

Quality - transition

The quality of our service remains of the highest priority to Citizens Advice. Our quality monitoring process rigorously measures the standard of our contact responses in a number of areas.

Our process ensures both our delivery centres and Citizens Advice review a proportion of contacts in detail each month. To ensure this is successfully embedded we will:

- Train all quality assessors on how the framework is applied
- Undertake and support internal quality benchmarking exercises
- Ensure consistency is achieved across all delivery centres through levelling
- Work with all centres to continually refine and develop the process
- Share best practice between delivery centres on a regular basis, through a Quality User Group

Quality - transition

Through transition we will conducted a number of additional checks using a variety of data sources to ensure greater granularity of performance

- File reviews - checking case files appear correct and appropriate for partner use
- Data quality targets - confirming data has been recorded correctly
- Short call analysis - ensuring level of service is consistent on shorter calls
- Coding audits - checks around specific code families and associated referral activity
- Customer Satisfaction surveys - increased sample sizes of client post call surveys

Quality - Transition

We will implement an additional quality dashboard that allows tracking of performance in various quality areas by centre, to allow for comparison and trend analysis.

Delivery Centre	Total number of advisers	xx			
Quality activity	Number (per lot)	Frequency	Green	Amber	Red
Increased QM reviews	One additional per adviser	Weekly	70% pass rate	69.9% - 60%	Less than 60%
File reviews	50 (250 per week)	Daily	85% pass rate	84.9% - 75%	Less than 75%
Short call analysis	One per adviser	Monthly	95% pass rate	94.9% - 85%	Less than 85%
Coding/RNS audit	10% new cases with specified codes	Weekly	90% correctly coded	89.9% - 80%	Less than 80%
Increased CSat post call surveys	As per target	Monthly	50% transfer rate	49.9% - 40%	Less than 40%
Citizens Advice					
Quality activity	Number (per lot)	Frequency	Green	Amber	Red
File reviews	50	Weekly	85% pass rate	84.9% - 75%	Less than 75%
Short call analysis	20	Monthly	95% pass rate	94.9% - 85%	Less than 85%
Coding/RNS audit	10% new cases with specified codes	Weekly	90% correctly coded	89.9% - 80%	Less than 80%

Quality - Transition

We will also implement data quality tracking processes to ensure the correct information is being collected

Measure	Green	Amber	Red	Delivery Centre	13/02/2017	20/02/2017
Caller Postcode (all general consumer, energy and post cases)	Greater than 95%	94.9% - 85%	Less than 84.9%	1	97.0%	88.0%
				2	97.0%	78.0%
				3	95.0%	90.0%
				4	94.0%	88.0%
				5	98.0%	89.0%
				6	98.0%	97.0%
				7	96.0%	89.0%
				8	92.0%	99.0%
Caller region and Trading Standards ID (TSID) (all general consumer cases)	Greater than 95%	94.9% - 85%	Less than 84.9%	1	96.0%	98.0%
				2	87.0%	90.0%
				3	91.0%	94.0%
				4	99.0%	97.0%
				5	97.0%	98.0%
				6	85.0%	90.0%
				7	90.0%	90.0%
				8	97.0%	96.0%

	Caller Postcode	Caller region/TSS ID
Target	Above 95%	Above 95%
Delivery Centre 1	90.0%	97.0%
Delivery Centre 2	87.5%	88.5%
Delivery Centre 3	92.5%	92.5%
Delivery Centre 4	91.0%	98.0%
Delivery Centre 5	93.5%	97.5%
Delivery Centre 6	97.5%	87.5%
Delivery Centre 7	92.5%	97.0%
Delivery Centre 8	95.5%	96.5%

Referrals - Transition

The importance of intelligence to our partners continues to be a priority for the service.

In the past six months we have worked with our existing supplier to monitor and drive referral activity, to ensure the highest possible amount are being correctly identified and sent to our partners.

The results of this project have been positive, with an increase of greater than ten per cent of referrals as a proportion of complaint type cases realised, and we have a number of resources from this work we will be using with our new suppliers to embed the same approach from the start of transition onwards.

Performance

Performance is measured against a range of targeted areas:

- **Key Performance Indicators (KPIs):** these relate to quality of advice, accessibility of the service and Customer and partner satisfaction
- **Performance Indicators (PIs):** these measure other aspects of service delivery such as complaints, quality of data input and response to partner feedback

Ongoing performance against these measures is recorded and tracked using a monthly dashboard report

Key performance indicators (KPIs)

- KPIs encompass:
 - Those devised by BEIS focussing on the broader remit of the service
 - Citizens Advice KPIs which are designed to enable use in practical application
- Each KPI is defined and measured in terms of:
 - **Target service level**
 - **Minimum service level**
 - **Breach service**

Monthly performance dashboard - KPIs

- These are the main performance measures for the service
- They relate to advice quality, accessibility, customer and partner satisfaction

	Supplier KPIs							
	Quality Monitoring	Service availability	Service level (calls answered in 60 seconds)	Abandonment Rate	Webform Response Time (2 WD)	Webform Response Time (3 WD)	Customer Satisfaction	Partner satisfaction
Target	70% 'Good'	99.50%	80%	<5%	95%	100%	80%	<2%
GB	71.99%	100.00%	82.42%	1.89%	98.08%	100.00%	95.98%	1.73%
AG	71.64%	100.00%	81.55%	1.88%	98.05%	100.00%	96.06%	1.77%
CAD	73.02%	100.00%	87.55%	1.92%	98.20%	100.00%	95.52%	1.51%
GC	72.14%		82.11%	1.82%	98.05%	100.00%	95.88%	
Energy	62.07%		85.68%	2.26%	98.63%	100.00%	97.45%	
Post	81.82%		85.57%	3.78%			98.11%	

Monthly performance dashboard - PIs

- These are the broader performance measures for the service
- In addition to the below, other PIs include complaint resolution, knowledge sharing with advisers and disaster recovery planning and testing

	Supplier PIs and procedural targets							
	Quality			Complaints	Partner Feedback			C Sat response rate
	Data completion	QM bench marking status	% of quality & performance reviews late	Volume of complaints	Time to respond to feedback	Time to respond to urgent feedback	Time to implement changes to feedback	% of call surveys completed exc disconnections and exemptions
Target	10/10	2	weekly	n/a	95% in 5 wk days	95% in 4 hours	95% 2 wk days	30%
GB	9.75			32	100.00%	97.26%	100.00%	35.00%
AG	10	1	0	30	100.00%	100.00%	96.15%	
CAD	9	1	1	2	100.00%	77.78%	100.00%	

Performance management framework

There are a range of measures in place which support managing the performance of the service

- **Monthly Performance Dashboards** - provides a picture of performance which is shared with suppliers, partners, BIS and other stakeholders
- **Service performance and targets reviewed quarterly by BEIS** - ensures we are able to demonstrate the effectiveness of the service
- **Quarterly on site audits held with suppliers** - to monitor compliance with service requirements and agree actions for improvement
- **Monthly contract calls are held with suppliers** - to discuss current performance and address any issues
- **Service improvement plans** - when performance is below the required standard this formalises improvement activities and associated timescales

Customer satisfaction surveys

Customer satisfaction is measured in two ways:

- An after call automated survey each month, which usually includes around 5000 clients, which checks the quality of customer service
- A detailed survey twice per year of around 1800 clients, conducted by an external organisation that is more detailed and allows clients the opportunity to reflect on the advice they were provided

BIS set a KPI for customer satisfaction of 80 per cent:

- Last after call survey (September 2016) - 97 per cent of clients were satisfied or very satisfied
- Last detailed survey result Q2 2016/17 - 84 per cent of clients satisfied or very satisfied with the service

Performance - Transition

All new delivery centres have undertaken detailed resource modeling using recognised methodologies to ensure they are adequately staffed.

We will share historical contact trends, to allow detailed shift planning, and work with all centres to set up strong links between each other, to support the overall delivery of the service.

Regular performance information will be shared with the consumer service operations team to allow active performance management, and data will be shared with partners and BEIS as it is currently.

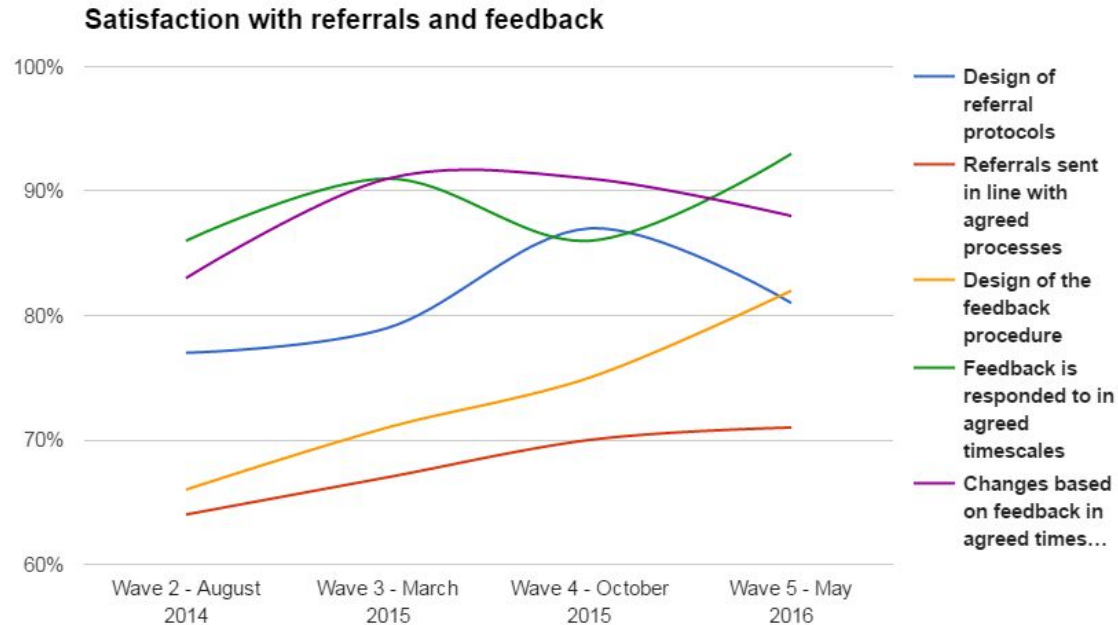
Performance - Transition

We will also have access to performance data at a granular level to allow us to conduct our own root cause analysis as required.

	Sickness & Absence	Annual/Other Leave	Paid Breaks	Training & Coaching	Meetings, 3 to 3s	Out Of Service	Other CD Activities	Talk Time
Week 49	509:25:00	595:45:00	333:17:00	145:18:42	22:52:26	0:03:13	368:20:58	3198:00:54
Week 50	537:55:00	594:45:00	330:00:50	96:44:43	43:28:34	0:17:50	306:26:42	3192:21:21
Week 51	388:10:00	594:55:00	325:18:35	385:40:30	32:19:12	0:15:03	421:11:09	3025:30:39
Week 52	277:11:00	478:15:00	249:49:31	164:30:45	26:59:42	0:00:47	391:33:27	2406:13:30
Week 01	354:00:00	374:45:00	265:21:06	26:56:51	17:08:47	0:01:04	343:00:40	2537:26:44
Week 02	576:50:00	605:30:00	314:07:22	77:59:07	31:36:13	0:00:00	330:16:15	3073:27:12
Week 03	445:40:00	524:30:00	321:56:12	118:05:13	40:48:34	1:38:44	335:33:32	3098:31:42
Week 04	395:45:00	515:00:00	309:43:02	148:31:29	50:59:15	1:19:52	367:02:31	2780:27:43

Performance - Transition

We will also continue to monitor client and partner satisfaction trends and work with delivery centres to identify and put in place corrective actions.



Consumer operations - implementation workstreams

- Implementation management
- Management of delivery centres
- Recruitment and training
- Systems and facilities
- Management of service partner relationships
- Management information
- Quality monitoring
- Energy and Post
- Complaints
- Business processes

Service transition - Partner engagement

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Overview

While the scope of the transition project is to maintain the scope and performance standards of the service, we recognise the value of ensuring our partners are engaged as fully as possible, ensuring they have the correct levels of information at timely intervals.

We have, and will continue to, use a variety of channels and methods to share information on the consumer service as it moves into the Citizens Advice network.

To ensure a smooth transition, we will also welcome additional support from partners by way of feedback and case audits.

Communication

Our project communications has ensured we have engaged with partners in a variety of ways:

- Regular email communications through existing distribution lists
- Engagement through the Trading Standards working group
- Q&A session and handouts at CTSI conference
- Trading Standards representatives on the delivery centre selection panels

Prior to transition we will also:

- Commission a short film outlining our approach to transition
- Create and circulate a partner readiness pack

Impact on partners

Given the scope of the service will remain the same, there should be minimal impact to partners.

There will be a greater number of delivery centres from a feedback perspective, and we will ensure updated information is shared with partners in the relevant process and on our partner pages.

Advisers will also take a short time to reach optimum performance levels, which may see increased levels of feedback.

Any issues or queries you have post transition can be raised through the existing duty provision - operations@citizensadvice.org.uk or **0300 5000 922**

Support

Where possible, we would be grateful for any assistance you might be able to provide to us during transition in the following areas:

Regular and consistent feedback on cases - While our quality processes are extensive, they will only by design ever evaluate a proportion of our cases.

Where issues are identified on referrals, notifications or case data your input can allow us to directly work in conjunction with delivery centres to correct issues, and continue to develop and improve the overall experience for partners.

It may also provide us the opportunity to consider developments to the systems or service more widely.

The process is available on the partner pages.

Support

Where possible, we would be grateful for any assistance you might be able to provide to us during transition in the following areas:

Supporting the next Trading Standards audit of our cases, which will be organised for the summer of 2017 - In addition to regular feedback, these audits ensure partners provide the opportunity for partners to highlight what the service does well, along with development areas.

The nature of the audit framework creates a consistent and wide ranging picture, and identifies themes and key areas of focus for the service.

Post transition, it will be a vital tool in evaluating our success from a partner perspective

Support

Where possible, we would be grateful for any assistance you might be able to provide to us during transition in the following areas:

Providing additional comments, where relevant in particular to transition, to your partner satisfaction survey responses - We analyse not only the question response data from partner satisfaction surveys, but also the comments.

These provide us with added context in relation to the scores we receive, and also provide opportunities to strengthen relationships at individual authority level.

Any feedback you have on the transition or the service following its completed will be fed into our overall evaluation of the project.

Support

Where possible, we would be grateful for any assistance you might be able to provide to us during transition in the following areas:

Raising any questions you might have with us, so we can share the responses with all partners - The consumer.transition@citizensadvice.org.uk mailbox can be contacted with any questions or concerns you have during the transition process.

Following transition we will also seek to build relationships between new delivery centres and Trading Standards regional groups, to further facilitate ongoing dialogue, development and improvement of the service.

Trading Standards feedback on selection process

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advice**

Trading Standards perspective

Deana Perchard, of Halton Trading Standards service, was involved on the selection panel, and has provided some thoughts on the process and her experience:

“I have been fortunate to work in areas serviced by excellent local Citizens Advice offices who have provided much needed services.... I did, however, have concerns that the consumer service was such a different beast to those services provided on a local level (knowledge based, national service, range of stakeholders with differing requirements and referral pathways, demanding KPIs, and a call centre delivery model) that individual offices would not have the capacity or experience to cope.

I had the pleasure of meeting Citizens Advice Bureaux that were dynamic, professional, business focussed, already structured around performance managed services and with a track record of successful delivery in a call centre environment. I was reassured that the successful applicants were able to demonstrate that they understood how the consumer service differs from the traditional bureaux service and why their ability to accurately record and correctly refer/notify was so important to the work of Trading Standards.”

Trading Standards perspective

Deana Perchard, of Halton Trading Standards service, was involved on the selection panel, and has provided some thoughts on the process and her experience:

“I was able to represent Trading Standards’ interests on the selection Panel for the large lots. The Panel was composed of senior and board level managers from Citizens Advice with expertise in the current consumer service, finance, project management, business continuity and the IT systems required to operate the consumer service. I was encouraged to provide input for the presentation arrangements.”

Citizens Advice structured the presentation sessions to ensure that I had a voice in the ‘interview’ process. The presenters were rigorously challenged by the Panel, in detail, in the following areas: their vision for the service; their plans for operational delivery; their management of risk and governance; their understanding of the service; budget management; their understanding and management of stakeholder relationships and referrals and their transition arrangements.”

Trading Standards perspective

Deana Perchard, of Halton Trading Standards service, was involved on the selection panel, and has provided some thoughts on the process and her experience:

“I believe that the three stage selection process has been incredibly robust with applicants having to satisfy over 60 essential criteria. Senior officers in Citizens Advice have been involved at all stages and have committed a huge amount of time to the design of the process and the selection at each stage. There is a clear determination to make sure that the new service delivers for the consumer, referral partners and funders and that the transition is effectively managed to make it as seamless a process as possible for those stakeholders.”

As with any large scale change there is likely to be some degree of teething problems. From what I've seen of the process so far Citizens Advice have done their best to anticipate and mitigate these and they are committed to making the new service a success. I have found there's a willingness to listen and I think it's essential that all stakeholders engage and work together to iron out any early teething problems.”

Speaker - new Delivery Centre

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Service Development Opportunities

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Further questions:

consumer.transition@citizensadvice.org.uk

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