

Dear partners,

Please find attached our monthly update on the transition of the consumer service.

Best wishes,

Tom Ballard
Operations Manager

Consumer service transition

Partner update: May 2017

The transition: a summary

From April 2017, the consumer service will be delivered by a small number of local Citizens Advice delivery centres. The transition to the new delivery centres started in February 2017.

What's already happened:

We are pleased to report that the transition of the service is close to being completed, with significant progress taking place through the end of March and the start of April in particular, to bring us to that point.

Caerphilly, Cardiff and Vale, and Staffordshire North and Stoke-On-Trent are all now live on the service handling contacts, and join Gateshead and Manchester in delivering the service. Manchester and Sheffield are also now handling contacts on our energy and post services, joining Gateshead who went live with this service back in January.

Our Torfaen centre, which is being staffed partially with advisers from our previous service provider, also commenced operating in April. Their final two additional advisers were new to the service and in training until mid-May when they went live. Our final centre, West Lindsey (based in Gainsborough), also went live in mid-May.

We continue to undertake a number of additional quality checks over and above our regular quality process. This includes reviewing case records and running a variety of data reports.

Some quality issues are not unexpected at this early stage of adviser's development. As in the previous update, it is reassuring that the majority of areas we are identifying for rectification are process related. The level and quality of advice being offered has been, from the cases we have examined and feedback received, generally of a good standard. Feedback levels have remained relatively low, indicating no significant issues have been identified by partners.

The management teams at all centres continue to work with advisers, offering side-by-side sessions, coaching and training where appropriate and continue to refine the output of their advisers, with support from our central operations team as needed.

We are grateful to those partners who are feeding back to us on any issues. This information is being added to our own quality checks and together provides a wide range of data to delivery centres to allow them to plan and enact development plans for their teams. Feedback can be provided through our existing process, details of which can be found on our [partner pages](#).

The table below summarises our progress in relation to transition, demonstrating that the all centres are now live.

Delivery centre	Advice areas	Status
Gateshead	General consumer, energy, post	General consumer - Live Energy and post - Live
Manchester (with Sheffield)	General consumer, energy, post	General consumer- Live Energy and post - Live
Caerphilly	General consumer	Live
Cardiff and Vale*	General consumer	Live
Staffordshire North and Stoke-on-Trent	General consumer	Live
Torfaen	General consumer	Live
West Lindsey	General consumer	Live

* Cardiff and Vale are also responsible for delivering our Welsh language service, across all advice areas and channels

Here's a reminder of the transition timeline:



From a partner perspective we circulated our [transition film](#), which outlines the background to transition and the approach taken. We would encourage you to share

this with any staff that may find it of use, and the link is also on our [partner pages](#), along with the partner readiness pack which we also circulated in April.

What's happening now:

We are working with all centres on performance measures, as well as quality processes, to ensure all aspects of the service are being delivered well, and working with them where issues arise.

We have just commenced a series of audits with centres, held on site. These allow us to undertake a series of checks and reviews, to ensure adherence to processes and service deliverables. They will be undertaken based on the order of go-live, with Gateshead having just been completed and Manchester and Sheffield to be completed by the end of May.

Finally we have formally accredited the trainers at each of our delivery centres, to certify them as capable of delivering subject matter, customer service and systems training to our advisers. Upon completion of this process, not only are centres self-sufficient from a recruitment and training perspective, but it also allows us to form a training user group that will, amongst other things, start to evaluate how we train our advisers and how this might be developed in the future.

Current performance

It is pleasing to be able to report that wait times have reduced significantly now the majority of the service has transferred to the new delivery centres.

By the end of April 70 per cent of calls in England and Wales were being handled by our new delivery centres, and this number continues to increase in line with our transition plan. Our original provider continues to deliver a proportion of the service at reduced capacity and will continue to work with us until July to offer us support while we conclude transition.

Partner feedback levels have remained elevated, which we expected during transition, and again we are grateful for that which we have received, to help us develop our new teams. It remains under our target level of no more than 2 per cent requiring corrective action however.

An outline of April's performance is provided below:

	Quality	Webform Responses (3 WD)	Client Satisfaction	Partner Satisfaction	Average speed to answer (seconds)	Forecast accuracy (GC)	Referrals as a % complaint cases	Volume of complaints
Target	70% 'Good'	100%	80%	<2%	-----	95% - 105%	-----	n/a
	70.29%	82.32%	98.00%	0.89%	55	85.65%	44.03%	18

Average speed to answer has reduced significantly in the last two months, while referral levels and quality have been maintained, along with client and partner satisfaction. We continue to work with our new delivery centres to increase proficiency regarding webform handling, as they become familiar with the processes and practices around these.

What's happening next:

Now we have concluded the opening of delivery centres, we will work to ensure the remainder of the transition is closely managed, and the remainder of volumes are moved from the original provider to our new centres as per our plans.

We will also be commencing work to close down the transition project formally in the coming weeks, including a lessons learned report.

Once transition is completed, our attention will shift towards the service development opportunities our new delivery model can present to us. We have already begun evaluating areas for improvement and development. Once the project closes we will start to communicate our plans with you more widely, and explain the role partners can take in helping us to develop the consumer service in the coming months and years.

We are currently making arrangements for the upcoming Chartered Institute of Trading Standards conference in June. We will be on hand to talk through transition and answer any questions, and also discuss some of our early thoughts around service development.

Our aim is to return to partner dashboard reporting from June onwards (containing May's data). We will circulate a final transition update with this dashboard.

If you have any questions relating to the transition project, please direct these to our dedicated email address - consumer.transition@citizensadvice.org.uk - and a member of the project team will be pleased to respond.

Best wishes,

Tom Ballard

Operations Manager - Citizens Advice consumer service