

<b>Meeting Title:</b>	Citizens Advice – Trading Standards Working Group
<b>Date:</b>	Tuesday 18th July 2017
<b>Time:</b>	10:30 – 13:30
<b>Location:</b>	200 Aldersgate London
<b>Attendees</b>	<p>Citizens Advice: Jon Walters (JW) Karen Wilkinson (KW), Florrie Galloway (FG), Mel McGinn (MM), Simon Kaplan (SK)</p> <p>Carol Rice (BEIS), Karen Haseldine (BEIS)</p> <p>Gerry McNamara (CAD/CAS)</p> <p>Ivan Hancock (Dorset TS), Georgina Heath (Lincolnshire TS), Judith Gordon (Hertfordshire TS), Pam Wood (Lancashire TS), Rebecca Webb (Kent), Tracey Johnson (Gateshead CS), Ken Daly (SCOTSS), David Jones, Gina Green (Bucks and Surrey TS), Elizabeth Shaw (Suffolk TS), Elizabeth Smeed (Camden TS), Dai Jones (Wales) and Jenny Rawlinson (Stoke TS)</p>
<b>Apologies</b>	<p>Andrew McConnell (Consumer, Competition and Regulation Unit) Kate Davies (Oxfordshire TS), Simon Sumner (Staffordshire TS), Angela Currie (East Riding TS), David Brownlee (CAS) Alli Dunstan (Citizens Advice)</p>

**UPDATE AND ACTIONS FROM THIS MEETING**

**1. Welcome and introductions**

Jon Walters (JW) welcomed everyone to the meeting. Everyone introduced themselves.

## 2. Outstanding actions from last meeting

<p>1. Action: To create a user guide containing screenshots for the group and TSS to use for the reports used on the portal for Referrals and Notifications. - Update: with the more recent focus on transition happening although we have started on the guide it won't be ready to distribute for a little while. AD to pick up once back from leave.</p>	<p><b>JW/AD</b></p>
<p>2. Action: Website volumes link to be added to the partner pages - we are discussing with the relevant department - Simon Kaplan to talk more about this later in today's meeting</p>	<p><b>JW</b></p>
<p>3. To ask about yearend figures – top ten to add to partner pages and to publicise - Simon Kaplan to talk more about this later in today's meeting</p>	<p><b>JW</b></p>

## 3. Consumer Education update - including an update from the Campaigns team

See Consumer Education slides attached, which Mel McGinn presented. The presentation can be found [here](#)

MM can share feedback from SAFERjobs presentation with young people if required

Education resources - updated and rebranded. MM - Would be good to have feedback on topic areas. Looking to put Essex videos of scam awareness on partner pages

MM asked the group if anyone would like to contribute to the Adviser magazine articles as this would be useful.

Ken helped before with articles.

**ACTION 3.1 for JW - add online link to Adviser magazine to partner pages**

Carol Rice - Scams awareness - the Consumer Minister provided a quote and a letter for the launch which went out with scam awareness packs. Also planning to house an event in Dudley on 27th July. Beth from CitA Campaigns is working with the constituency office. Involves wider Dudley area. Anyone local can be involved if wanted. Get in touch with Beth at CITA -

[beth.yamamoto@citizensadvice.org.uk](mailto:beth.yamamoto@citizensadvice.org.uk)

Contact Melanie McGinn

[melanie.mcginn@citizensadvice.org.uk](mailto:melanie.mcginn@citizensadvice.org.uk)

**4. Performance and operations update (JW)**

See slide presentation above attached, presented by JW.

Carol Rice - asked are complaints evenly spread between the new centres? KW replied that they are and that we have recently done refresher training course on complaints handling with centres. No centres having more than others. There will always be complaints around managing client expectations around next steps or in instances where the consumers have no rights and they are not happy.

Carol Rice - do you know how level of complaints balances against CitA

complaints. JW - difficult to compare. Could compare to other national call centre services. KW - We also work with client services closely in regards to complaints but complaints about LCA's mainly seem to be for access reasons - opening hours etc

JW - We have faced recruitment and attrition challenges across the service earlier than anticipated in regards to advisers not right for the role and some have left or are leaving. All centres are trying to get ahead of this and have done another training intake to offset this.

Carol Rice - Are attrition rates, staff leaving rates, similar to other telephone helplines services? JW - usually advisers stay within consumer service due to nature and complexity of role so it is unusual but we are getting on top of it. KW - may be due to advisers not fully understanding what the job involved. No way of them experiencing it before applying, as no calls to listen to, better now for new advisers as they can see the centres, listen into calls and the new centre managers have more of an understanding of the role and the service and as such role profiles have been tweaked.

JW - looking at making the training for advisers more flexible.

KW - the three Welsh centres have linking up and are sharing resources to send advisers together to learn and train. We have found this has been useful.

Tracey Johnson - with having new advisers recently trained in Gateshead, in an ideal world would have loved to give advisers the opportunity to see the TS side of it however once the advisers are trained and on the phones, we can't do that as they do not have the time. The new people in training, took the opportunity to work with TS for half a day so they can see their side of it and understand it better. Advisers found this really useful and even made briefing note for other advisers who have been unable to attend.

JW - thinks this is valuable, maybe put together short film that shows it works

at both ends.

Jenny Rawlinson from Stoke said she would be happy to do this with new staff in Staffordshire North/Stoke on Trent centre as they are near them.

JW introduced Gerry McNamara and explained his role as Contract Manager with CAS for CAD.

Karen Haseldine (BEIS) talked about product safety and how they had recently identified some improvements to the product safety information on our website and the government hub. The product safety policy team will then think about how this information is then used.

JW explained we previously have an IVR fast track option for clients with doorstep or safety issues, so these calls were answered quicker or straightaway during transition. There was no evidence to say clients realised this and pressed this option to skip the queue.

Tracey Johnson asked if once an adviser selected safety/doorstep crime, whether there was then the option to add in extra fields to collect extra information on a webform?

JW explained that they had tried this before and that they found developing the case management system to do this, would be expensive. It had been suggested that they tried to do a work around on the knowledge base but the challenge was a combination of coding and needing a dynamic tool to build codes, but we would need to think about the costs. Money Advice Trust have created an in house similar one but difficult to produce and get right.

CSAT - Client survey due next quarter - reflection survey

QU - Tracey Johnson asked if the after call surveys counted as a result if the client puts phone down and disconnects on the call? JW - no, figures based on completed surveys. We acknowledge there will always be a number of

disconnects and the centre target is 35% of cases to be transferred then completed.

## **5. Transition project (JW)**

See slide presentation above attached, presented by JW.

JW - webforms dealt with top four centres - ZG - Gateshead, ZM - Manchester , ZA - Cardiff, ZC - Caerphilly

JW - explained that the centre managers meet at a regular Ops working group, which varies in location. It would be possible to open it up and we could have TS along to some of these so that they had an idea of what went on. The next one is on Weds 6th September in Cardiff regional Cit A Office. Any interested parties to contact KW please.

Jenny Rawlinson said she had noticed advisers struggle with civil/business protocols and they are not telling clients about civil business advice available from TS. JW - work being done on this as we aware this is a challenge, high on the agenda to make sure this is resolved

### **ACTION 5.1 for JW- update everyone on civil/business protocols at next meeting**

Tracey Johnson - difficult to spot things like this (that TS offer business/civil advice) that have been missed and we need to ask why this is being missed

Jenny Rawlinson said that all TS offer different things on their protocols so it can be confusing for advisers

Tracey Johnson said that she thought it was possibly due to RAST pages not

being clear enough for advisers to understand

Jenny Rawlinson suggested that we asked all authorities to refresh their protocols and that it may be worth going back regionally and asking TS to do this

JW - In regards to audits we are looking to get centres to do peer reviews and review each other in the near future.

JW recently held a lessons learnt session following transition and we will produce a report and share with you in regards to this.

## **6. Feedback process**

JW - we are very pleased to announce that we have created a new online partner feedback form which is in test phase at the moment. An example of the test form was shown on screen to the group. Alli Dunstan has been instrumental in designing and creating this form and we are aware that the benefits of a simpler format will hopefully encourage more feedback on our cases. It will begin just for TSS use for GC cases at the moment, but once we roll it out we will look to then create one for Energy and Post. We would like to encourage it for positive feedback too.

QU - Jenny Rawlinson asked if the feedback is to do with complaints for numerous advisers, which centre do we send it to?

JW said that you would send to the centre with the most recent adviser concerned then behind the scenes we will distribute this as necessary.

KW - if the feedback applies to multiple centres, this will be passed between each other. Centre will come to us at the Operations team if there is a disagreement between centres over who the feedback is for.

JW explained that we wanted TS to test the form before going live with it. Tracey Johnson explained she had tested it but was not sure people would understand centres codes so this needs to be clear. Tracey suggested that there could be a description beside the Adviser ID so it is clear what is needed. JW said that they would also issue guidance on how to complete the form.

QU - Tracey Johnson asked if it is possible for this form to automatically populate centre feedback forms (MI report)? JW happy to discuss this out of the meeting and explore this further

JW asked if anyone would like to test the form?

**ACTION 7.1 AD to share the form with:**

Gina Green at Surry - wants to be included in testing as firewall high  
Pam Wood at Lancashire  
Judith Gordon at Hertfordshire  
Liz Smeed at Camberley  
Rebecca Webb at Kent  
Ivan Hancock at Dorset

Jenny Rawlinson happy to help but not sure if they have the highest volumes

**ACTION 7.2 JW - to speak to AD and check which TS send in the highest feedback volumes and approach them to see if they would like to also be involved**

Carol Rice asked when we can expect the form to go live?

JW - hopefully October 2017 is not too ambitious

Liz Smead - may be worth getting someone who doesn't feedback to test the



form as they may have an issue with the current process and it might help to get them on board if the new form is easier to use. AD to have a think about this also on return from leave.

## **8. TSS Audit**

See slide presentation above attached, presented by JW.

Georgina Heath is helping to coordinate the audit in September.

Georgina explained that they were taking out the minimum of 50 cases rule and asking TS to aim for a day of auditing to make it easier for the smaller TS to join in. It is now up to authorities to do as much or as little assessing as they want. Georgina also discussed encouraging more authorities to participate - she wants to approach LA's who do not usually take part in the audits and understand why they do not take part and find out what is putting them off - i.e. time, resource etc? There will be a nil return and drop down box for people to complete as to why. Georgina asked the group if anyone had any idea for options as to why TS may not taking part. She currently had; no capacity and no value in taking part, any other reasons?

JW explained that maybe it was because TS thought we would not do anything with the info or maybe they don't like the audit process?

Tracey Johnson also offered that maybe TS officers cannot identify whether advice is correct or not? i.e. civil advice may be rusty and they don't feel confident to judge current advice

Carol Rice asked Georgina if, when complete they would follow up work to understand why TS are not taking part in the audits.

Georgina Heath explained that yes they will look at why and then see what they can do to change this and engage partners more

Tracey Johnson - in past only asked for a few authorities to take part.  
Georgina Heath explained that now as many TS can participate as they want to rather than only a few as it used to be

Georgina Heath also explained that they were all working on a guide for audit assessors to illustrate how to run the most suitable data reports so everyone can assess the cases consistently.

Audits to begin on 18/09/17, send back by 29/09/17, send back to Georgina by 6/10/17

Georgina will send audit information to TS regional coordinators but also to this group as well

Carol Rice requested a copy as well.

### **9. Service Development – Discussion:**

Development plan for the service for the next three years - KW passed out handouts. [Development Plan](#) These were distributed at TSI conference by our stand and focus on the 12 areas we are looking to enhance over the next few years.

Any feedback on the development plan happy for this to be sent into us.

Karen Haseldine (BEIS) - noted it says that the plan will be circulated in July 2017

JW - apologies, these were printed in advance and hopefully December 2017 more appropriate for final plan

Karen Haseldine mentioned that it might be worth having a draft plan.

Carol Rice mentioned the implications associated with plan and asked whether there was an implementation timetable?

JW - said that hopefully we can prepare for implementation of the more critical

aspects in the first few months of 2018

Ivan Hancock mentioned from his perspective that it was about maintaining volume levels rather than the recent downward slide in call volume.

BEIS recognise the importance CitA has for TS and that referrals continue to come through to TS

JW - idea behind plan is to demonstrate CitA taking these matters seriously and showing that these are our priorities

Ken Daly asked if CitA were willing to engage with Scotland? JW explained yes they would be looking to work jointly with CAS

**ACTION 9.1 for JW - circulate development plan update prior to next meeting and devise feedback mechanism**

Karen Haseldine BEIS asked if it is going to be a plan will be open to opinion or consultation or will the plan state that Cit A have decided the priorities?

JW it will be a devised plan that says here are prioritised areas that we will address. Opportunities for feedback on the way, plan to make sure we are on the right path for the plan.

Dai Jones mentioned that Wales TS were concerned about drop in referral rates and volumes, if not advertised then people not aware of our service. Also concerned about the intelligence; everything intelligence lead, finding not enough intelligence logged, heavily reliant on CitA database, if that resource shrinks then intelligence lead approach will be pressurised.

Ivan Hancock explained that they were the big issues for ACTSO

JW - reassured they will be addressed in the plan.

QU - Carol Rice asked whether there would be a ranking of the issues

JW explained that there would be a ranking of the overall plan and then a

timeline for each issue.

### **10. Consumer website - Simon Kaplan** - content lead for digital team

The presentation slides are in Section 3 of the slides which are found above.

Simon introduced himself to the group.

Gina Green asked if there was an average timeline from beginning to end for the topics researched and put on the website?

SK explained that it depended on the topic, top 100 get a lot of time to make sure they are clear, well researched and focused - 4 months research approx supplementary needs don't have as high traffic - less time but still same level of quality these can then be judged from responses and feedback

Dai Jones asked if the bounce rate could be clarified?

SK explained that the bounce rate was when a user only visits one page usually because the page has answered the question so it was a good thing in CitA's case.

Carol Rice asked if you tell if people went somewhere else for information and then came to CitA?

SK explained that yes you can work that out as incoming routes can be measured but vast majority of people type it into google and come from there.

Karen Haseldine BEIS mentioned that it sounded like there was an appetite from users for an online form on the different advice pages.

SK said that his team were looking at directing people to the webform area.

Georgina Heath asked if the user gets a response in feedback form to say please go here to fill out your complaint

SK explained that this was not an option at the at moment but his team were looking into this

SK - showed heat maps of user activity and mouse activity

Carol Rice asked how do you prioritise what you review? Where does the consumer sit in that?

SK explained that flight compensation site was in the top 5 on website. Expert advice team will also tell us if a topic is becoming popular as well. Developed a tool to manage backlog and lets us know priorities.

Jenny Rawlinson asked if there was anyway for TS to use this to see what areas people complain about? more intel from this aspect?

SK explained that there was some information collected on webforms but this was quite general. Could develop a form for TS which would have lots of fields to fill in which would give a lot of info for TS but then have to balance that against user journey and whether users will complete the form. Design the form so still get info but user will still fill the form in. Make it clear when they will be contacted by TS and easy to fill in.

## 9. AOB

Approved trader schemes - want to work closely with them but landscape unclear for advisers - **move to next agenda** to talk in detail about this

Georgina Heath asked about advisers coding - not suspected to be a scam rogue trader. If advisers saves the case to soon it auto saves to not suspected and cannot be edited. JW aware of this and we are fixing this

Tracey Johnson mentioned to remind people about updating authority coordinators are making sure the contacts are correct.

Tracey Johnson also mentioned that regional coordinators did also ask about doorstep crime, and whether there was anything CitA miss when taking calls about doorstep crime?

Georgina Heath explained that the audit review has a field for this so can see if

there is an issue with doorstep crime

**Next meeting will take place on 17th October 17, in meeting Room 1 Aldersgate 10.30-1.30**

JW closed the meeting and thanked everyone for attending

**Summary of Actions from today's meeting:**

No	Action	Owner
1	<b>ACTION 3.1 - add online resource to partner pages</b>	JW
2	<b>ACTION 5.1 - update everyone, on progress being made with civil/business referrals, at next meeting</b>	JW
3	<b>ACTION 7.1 - share the feedback form with:</b> Gina Green at Surry - wants to be included in testing as firewall high Pam Wood at Lancashire Judith Gordon at Hertfordshire Liz Smeed at Camberley Rebecca Webb at Kent Ivan Hancock at Dorset	JW
	<b>ACTION 7.2 - speak to Alli and see which TS have the highest feedback volumes and approach them to see if they would like to be involved with testing the feedback form</b>	JW/AD

	<b>ACTION 9.1 - circulate development plan after meeting</b>	<b>JW</b>	
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