

Meeting Title:	Citizens Advice – Trading Standards Working Group
Date:	Tuesday 17th July 2018
Time:	10:30 – 13:30
Location:	200 Aldersgate London
Attendees	<p>Citizens Advice: Jon Walters, Karen Wilkinson, Alli Dunstan, (minutes) & Ryan Barrett,</p> <p>Abbie Morgan (Cardiff & Vale Citizens Advice Call centre & Development manager).</p> <p>Mel McGinn (CitA Consumer Education)</p> <p>Beth Knight-Yamamoto (CitA Campaigns)</p> <p>Carol Rice (BEIS),</p> <p>Gerry McNamara (CAS)</p> <p>Pam Wood, North West (Lancashire TS); Gina Green, South East (Bucks and Surrey TS); Tracey Johnson NETSA (Gateshead TS/CS) ; Judith Gordon & Susie Helliwell (Hertfordshire TS); Liz Smeed, LOTSA (Camden TS), Ken Daly, Scotts</p>
Apologies	Ivan Hancock Simon Sumner, Andrew McConnell, Georgina Heath, Dai Jones

UPDATE AND ACTIONS FROM THIS MEETING

1. Welcome and introductions (Karen Wilkinson)

Karen Wilkinson welcomed everyone to the meeting. Everyone introduced themselves.

2. Outstanding actions from last meeting

Tom and Jon will look at the possibility of producing an impact report as the group confirmed that it would be good to see where a case started and follow it through to completion including how any funding impacted the case - JW and TB are still looking at Notifications

3. Consumer Education update, including an update from the Campaigns team

Please see Consumer Education slides

- Currently working on a complete overhaul of the page
- Align the format with the financial capability pages
- Create resources in different formats to enable greater flexibility for those using the resource
- Create resources to align with the consumer advice pages
- Share examples of good practice - including resources designed by local Citizens Advice offices/ CEPs and the Consumer Empowerment Alliance

Carol R asks if the detail can be added to the website and Mel notes that this is already planned as working currently with the content team.

Beth Knight-Yamamoto from the campaigns team discussed the recent Scam Awareness month - June and thanked the group for their participation.

Over 300 plus organisations took part in Scam Awareness - Various events across the country - Lancashire TSS had a "scam awareness dog", the dog wore an advertising slogan on its coat.

Consumer week will be held over the last week of November to coincide with Black Friday and Cyber Monday, however the actual

launch date will be the the Monday the 26th November. The theme will be Online Shopping Marketplace.

The inhouse post team will also be involved in the consumer week in relation to post and parcel returns etc

Jan 19 will be Big Energy Week

4. Performance and operations update

Please see Performance and Operations slides

Karen Wilkinson discussed that the focus for Operations team remains on ensuring quality of advice, data and referrals meets expectations. Customer satisfaction and partner satisfaction levels remain high, and quality targets are now being met. Performance levels across the service have been largely at expected levels. June saw a significant increase in contacts received into the service - while performance was impacted as a result of this, it was to a relatively minor degree.

Client satisfaction target levels continue to be achieved.

We are currently over forecast on GC and Energy and Post, with us looking at to re-forecast Energy and Post.

Referral levels as a proportion of complaint cases handled remains around 40% overall.

We have launched a new quality framework into the consumer service; this new framework mirrors the wider Citizens Advice approach to quality. Measures within the framework are broadly similar, focussing on client experience and quality of advice and information in partnership with how case is recorded, but the scoring system is more straightforward to apply. This brings the consumer service more inline with the National Quality Assurance process. Centres continue to work on benchmarking and levelling utilising the new framework to ensure consistency of approach. Rolled out in April and has been well received within the centres. Less prescriptive, scoring is easier and shows also advisor recognition. Broader framework and more straightforward.

New telephony platform go live took place in June, onsite support in the centres for the go live dates that were staggered to minimise impact to service users. All went smoothly, it has been a success. The new platform has added functionality to manage priorities and the new platform will retain the call recordings for 6 months.

It was added that Scotland have a separate telephony platform/system.

Karen went through a keyhole look at the dashboard see presentation attached. - Email completion within the centres - noted that a TL in Cardiff centre has developed an email generator tool that will assist the centres to become more productive at handling higher webform volumes. This tool was piloted and is currently being evaluated at senior level to ensure quality and viability before we progress it amongst other centres that handle webforms.

Quarter 1 audits have been prepared and are now taking place at the end of July onwards to evaluate centre performance in all areas.

Advisers have been fully trained on the new Package Travel and Linked Travel arrangements Regulations 2018. This included a variety of approaches from centres that we will be evaluating in terms of best practice. Abbreviations list held have been updated with the new Package Travel and Linked Travel arrangements Regulations 2018.

Highlands TSS launched a surcharging initiative - consumer service webforms are mirrored on this site and advisers have been re-briefed on relevant areas of legislation and process.

Complaints handling workshop taking place 18 July with delivery centres to communicate the changes in handling complaints involving multi centres, now the new telephone platform offers more flexibility around access of call recordings. Looking at sharing best practice on various aspects handover templates etc. The client facing complaints process is available on the website. 17 complaints generated in June - relatively low numbers given that we took approx 85,000 contacts in

June.

Volumes

The service has seen a sharp increase in volumes from May and while an increase in contacts is welcome from a service and partner perspective, this was unexpected and not a result of service development activity. The level of increase has been well above that which we are resourced to handle in line with performance targets, in some weeks by in excess of 30%. Adviser performance and efficiency has increased to help offset this level of demand, with average handling times in June falling in excess of 30 seconds. Analysis of our internal data has suggested a number of contributory factors, although no one single cause:

- Scams Awareness month appeared to drive more volume than in previous years
- Awareness codes suggested a greater number of clients were arriving at the service from the Citizens Advice website
- Local promotional activity from some Trading Standards authorities
- A greater number of clients may have been accessing the service incorrectly, when they instead required support from other areas of Citizens Advice

Jon W has met recently with Simon Kaplan who has responsibility for the CitA website to discuss volumes increases and we continue to analyse trends in more detail, and where action can be taken to support advisers or improve client journeys we will put this in place.

Performance has been impacted by increased volumes although not to a significant extent and increased adviser productivity has offset this to some degree.

Susie Helliwell - Awareness field does this capture social media? Jon W it does high level but not to this detail and also relies on the client understanding and accurately conveying their journey to us

Liz Smeed - Do Ops need to know about regional events as London TSS

week happening soon.

Jon W - Yes it would be helpful because we can plan resource

Jon W asked the group if they feel busier - all agreed it did feel busier.

Action: Jon to produce regional analysis graph document looking at volumes year on year and share with the group.

5. Q&A Partner briefing document (Tracey's document)

"Understanding the role of the consumer service"

Jon asked the group for their views on the document and if they had any suggestions to add before the document was rolled out/shared with the TSS community.

Carol R - a very good informative document and this will really assist in educating colleagues into the work undertaken by the consumer service and the document shows how the consumer service works with LA TSS, which is great.

Gina Green - Yes a really helpful document/tool to inform front line officers that work in TSS what is in the scope of the consumer service and to understand the challenges faced.

Susie Helliwell - Great that this document contains information relating to adapter problems and if experienced explaining the steps to take to resolve. Also the document notes about missing data and what to do if LA TSS feel that they are not receiving data, e.g. payment method, date purchased etc

Abbie M - Document offers transparency to what advisers do and the challenges faced, clearing up any misconceptions. Maybe a similar document could be formulated from the side of TSS for the benefit of our centre advisors to have the wider appreciation. Advisors would

appreciate more feedback when a case reached LA TSS as to what happened next in that client's journey. More interaction and feedback by TSS on specific cases would help the advisors appreciate the work carried out by LA TSS.

Jon W added that this is the start of the journey and we can add to this document as required. Advisors and TL planned to have more exposure to LA TSS through the activities of the partner engagement plan.

Liz Smeed - Biggest query on feedback from colleagues is " why is that feedback coming to us", so if a couple of lines can be added to the document to cover this process please. Tracey noted this.

Judith Gordon - added to Liz suggestion - it is very difficult to identify where the offence happened in some cases.

Karen W requested Tracey add another point in the section on the Partner feedback form, noting that not all TSS can access it for IT reasons and for those that can't, we welcome feedback on the old excel forms or by email into operations.

Jon W - we will amend the document with any suggestions thank you and then circulate and promote and we can add that any suggestions from the wider TSS community are welcomed. If any suggestions are received we can discuss at the next TSWG, we will add an Agenda item for this just in case.

Action: Tracey to make suggested updates to the Understanding the role of the consumer service document, then the final version to be shared with the group to cascade.

6. Case Notes Mini Project the next chapter

Please see the slides for the case notes mini project

We undertook a mini project on case notes.

Several conference calls and in-depth discussions took place with all the delivery centres team leaders. A process document was formed from a list of actions taken after each call which now forms part of a business process for the service and we have undertaken data quality checks on case notes since and supported those delivery centres found to be struggling.

Partner satisfaction has seen a 13% increase for case notes and so we have decided to move our focus onto a new project. We do plan to review case notes again to ensure best practice is being undertaken.

Our next mini project will focus on searching and creating traders.

Advisers to consistently search and attach an existing trader premises; prevent advisers creating a new record without searching effectively for a trader first as this is likely to cause duplicate traders. Duplicate trader premise records can cause the trader tracking failure. We aim to clarify and simplify the trader searching. Creating a process to deliver some key messages to all the centres on the effects of not following the process.

7. Development Plan

Please see the develop plan slides

Recognising the consumer service has done largely the same activity in the same way for a number of years, we undertook a review and initiated a development plan. There were the overarching risks and challenges that were identified that required solutions.

- Website Intelligence

- Scope of work agreed and scheduled by content team.

With regards to Web Intelligence development plans, Jon discussed that the development of online tools will be based on the pre existing Second Hand Cars. This tool will be enhanced to capture client data

which can then feed into TSS as intelligence. The Second Hand Car Tool will act as a pilot initially, with the potential to expand to other tools like faulty goods covering different areas. Content team working on this currently and we are hopeful that this will be available at the end of this year.

- Interim 'Geo-tagging' intelligence from Citizens Advice website

Geo Tagging will provide additional intelligence relating to clients use of our website, we are again working with the content team on this functionality.

- Webchat
 - New platform procured
 - Client journey design commencing in July
 - Selection of delivery centre(s) to pilot being finalised
- Training
 - Evaluation of training effectiveness taken place
 - Work to reduce breadth of legal content has been undertaken
 - Wider evaluation of potential improvements though new tools and methodologies is underway.

Training, Peter Stonely has been involved with reviewing the training review to see if we are able to condense the training time - currently looking at 15 weeks for advisor training, from placing the advert to having a person live on the phones.

Carol R asked if the advisor attrition/turnover had now stabilised.

Jon W - Yes, still some challenges faced in areas however it is better and not unmanageable. Jon asked Abbie how this was now managed in the centres.

Abbie Morgan - Focus was now more on staff development, investing in the staff and giving them career paths, not just number crunching.

Promoting the benefits of the advisor role.

Karen W added that staff could now work shadow other members of CitA staff within the local office.

The Learning and Development team within CitA offer support and offer various Training resources and dedicated support of trainees. Supporting and contributing to the needs of trainees is seen as everyone's responsibility.

Judith Gordon asks if the training is generic? Is best practice shared?

Jon W- The Broad principle of the training material is the same yes.

Jon W and Karen - Best practice is shared through

all of the centres and they regularly speak to one another through conf calls or google hangouts.

Also we have monthly Operational Working group meetings where all the centre managers come together, Bi Weekly calls with the centres and Team Leader days.

Abbie Morgan added that there is a better working environment now and our emphasis is on behaviours.

- Trader referrals
 - Potential partners for pilot have been evaluated
 - Communications packs drafted
- Network engagement
 - Key messages for the network have been agreed and drafted, including awareness generation and client journey
 - Internal teams have been engaged
 - Tools, platforms and other opportunities are in place
 - Progress on hold given current volumes into the service, this is a temporary measure.

8. PSAT

Please see slides relating to Psat

Full results were shared on the partner pages and through usual distribution channels and we will continue to work on driving improvement on areas that are below expected levels.

Partner Engagement:

CTSI Symposium was attended and successful, new format worked well Welsh user group recently met at the Cardiff delivery centre - Cardiff hosts the Welsh language service provision. The meeting was productive and covered a range of areas around performance and engagement at a local level.

TL's were invited into the meeting and joined in with some of the discussions around case notes. The TSS officers stayed on to listen to calls and met the team.

TS representative from the South West also attended to observe the meeting as they may wish to replicate this meeting within their area. Regional meeting attendance - Jon W recently attended a regional East of England meeting.

Jon stated to the group please do let us know if you wish us to attend any of your regional meetings to talk about the work of our service if that's helpful, we will try our best to accommodate these requests.

Jon W and Tom Ballard attended the recent ACTSO meeting; primarily to discuss volumes. The meeting was a very positive one.

Team Leader away day opportunity- Nigel Strick Cornwall TSS is partially funding an away day to be held in Bristol in the Autumn - still in planning and if this is successful we can look to roll out more widely.

Members of our support team visiting Trading Standards - Florrie Galloway dialed into the meeting to give the group an overview of her recent visit to York TSS. This was well received.

We continue to engage with TSS on a daily basis via the operations mailbox.

Gina Green - The team that have responsibility for the ops mailbox are great, they are efficient and always very quick to respond. Thanks for this was offered.

9. GDPR

You will be aware that data protection legislation changed from 25 May 2018 as a result of the General Data Protection Regulation and the Data Protection Act 2018. Due to this we need to update the terminology our data sharing agreements.

A document will be shared with the group and portal business administrators this week. There is no requirement to make any changes to your Data Sharing Agreements, this document is a short addition that outlines the changes to legislation around data protection. This document does not need to be signed or returned to us, just stored with your Data Sharing Agreements.

System changes are going live on Wednesday the 19th July to conform to the GDPR changes. Consumer comes under Public Task and therefore we no longer need to request express consent from the client to refer and the client has the right to be forgotten.

9. AOB

Tracey Johnson - Trader creation process explained and Tracey then asked the group if they would see within their regions and individual LA's if there was an appetite to create trader records with just an address and no trader name if one was not available.

Jon W explained that there had been conflicting requests on this via TSS feedback with some TSS noting that a trader address on its own meant nothing and current process dictates not to create a trader record without a name. Once we had broad consensus from TSS, we could either retain or alter the process accordingly. Any feedback on this to go to Tracey Johnson please as she is collating it centrally and will report back to the group.

The next meeting will be held on Tuesday 16 October 2018

Actions summary:

No	Action	Owner
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1	To produce regional analysis graph document looking at volumes year on year and share with the group.	JW
2	Tracey to make suggested updates to the Understanding the role of the consumer service document, then the final version to be shared with the group to cascade.	TJ/AD