

Trading Standards Working Group

200 Aldersgate, London



July 2018

Agenda

- **Welcome 10.30 - 10.35 (JW)**
- **Actions - 10.35 - 10.40 (AD)**
- **Education - 10.40 - 10.50 (MM)**
- **Campaigns - 10.50 - 11.00 (BK-Y)**
- **Performance and Operations update 11.10 - 11.20 (KW/JW)**
- **Volumes - 11.20 - 11.30 (JW)**
- **Cardiff and Vale delivery centre Q and A session 11.30 - 11.50 (AM/KW/JW)**
- **Mini project - 11.50 - 12.00 (AD)**
- **Consumer Service Development Plan - 12.00 - 12.15 (JW)**
- **PSAT survey 12.15 - 12.30 (JW)**
- **Partner engagement - wider piece on service engagement (Welsh TSS User group, Florrie, TL away day, ACTSO, EE regional meeting...) 12.30 - 12.40 (JW/KW)**
- **GDPR update 12.40 - 12.50 (JW)**
- **AOB 12.50 - 13.00 (All)**

Consumer Education and Campaigns Update



July 2018

Consumer Education pilot training session

Attendees - approximately 30 from LCA across Devon, Midlands and Greater Manchester

Feedback

- Good overview of the subject and diverse nature. Recognise methodology to interact with clients.
- Excellent and friendly. Feel enabled.
- Informative, clearly presented
- An interesting course that has broadened my knowledge
- Good valuable course

Area to work on

- I felt it was good but was pitched slightly lower than I hoped. Would like more tools to use when delivering workshops ourselves.
- Problem in using the info with clients in time available. Difficult to deal with main issue in time allocated as it is.



Snapshot of evaluation

	Five	Four	Three	Two	One		
Understand the role and benefits of delivering consumer education		14	7	2	0	0	<p>Understand the role and benefits of delivering consumer education</p>
Understand where it fits within other topic areas		12	10	1	0	0	<p>Understand where it fits within other topic areas</p>
Know the different opportunities to integrate CE into the advice process		7	14	2	0	0	<p>Know the different opportunities to integrate CE into the advice process</p>

Consumer Education webpage

- 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

Consumer education resources

We produce consumer education resources on a range of consumer issues. The materials are free to download. The activities are designed for educators/ group leaders to use to raise awareness of consumer rights and responsibilities and for learners to develop the skills and confidence to deal with consumer issues.

Car hire

Resources for addressing problems when hiring a car identified as being in the short-term car hire market.

Christmas postal services

Material has top tips for Christmas shopping and ensuring your post arrives on time, including information about your rights when shopping online, on the phone and by catalogue (distance selling).

Consumer rights

Awareness week to promote new consumer rights that came into force on 1 October 2015 with the final enactment of the Consumer Rights Act.

Contracts

Training pack offering different activities for understanding contracts as a consumer of goods and services.

Online Subscriptions

Consumers often sign up for subscriptions unwittingly, and can face problems cancelling future payments. The online subscriptions resource helps to raise awareness of key issues and where to access advice when dealing with subscriptions.

Doorstep crime prevention

Training pack focusing on how to recognise potential doorstep crime and how to get help.

We use a collaborative approach to evolve and expand these resources based on feedback from users - please email financial.skills@citizensadvice.org.uk

Resource topics

Financial capability session packs and bite-size activities arranged by topic.

Resource toolkits

Financial capability toolkits for working with different client groups and using new and innovative delivery models.

Resource support

- ▶ Trainer guidance
- ▶ How to use the new resources
- ▶ Presentations to use with clients
- ▶ Local Citizens Advice resources
- ▶ Other resources

Digital money coaching

Session packs and bite-size activities to support clients to embed financially capable habits and behaviours whilst improving their digital capability and computer skills.

Welsh resources

Welsh translations of our core activities most essential to delivering financial capability.

Life event interventions

Resources to provide targeted financial capability guidance to clients experiencing a change in employment status, health or personal relationship.

For more information about the consumer education resources please go to

www.citizensadvice.org.uk/about-us/how-we-provide-advice/our-prevention-work/education/education-resources/education-resources/

Contact Melanie McGinn

melanie.mcginn@citizensadvice.org.uk



Performance and Operations



July 2018

Performance and Operations

- Performance levels across the service have been largely at or exceeding expected levels in April and May
- 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
- Referral levels as a proportion of complaint cases handled remains around 40% overall

Performance and Operations

- 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
- Although an initial impact to results were seen, this related to familiarity with the new system as opposed to a decrease in the quality of cases
- Centres continue to work on benchmarking and levelling utilising the new framework to ensure consistency of approach

Performance and Operations

June 2018

	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
	76.82%	96.12%	96.94%	2.21%	49	121%	39.82%	17

Performance and Operations

- The service has recently migrated onto a new telephone platform, providing the majority of the delivery centres with greater functionality that they previously had
- Quarter 1 audits have been prepared and are now taking place
- 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
- 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

Volumes



July 2018

Volumes

- The service has seen a sharp increase in volumes from May
- 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
- Complaint levels for June have remained static

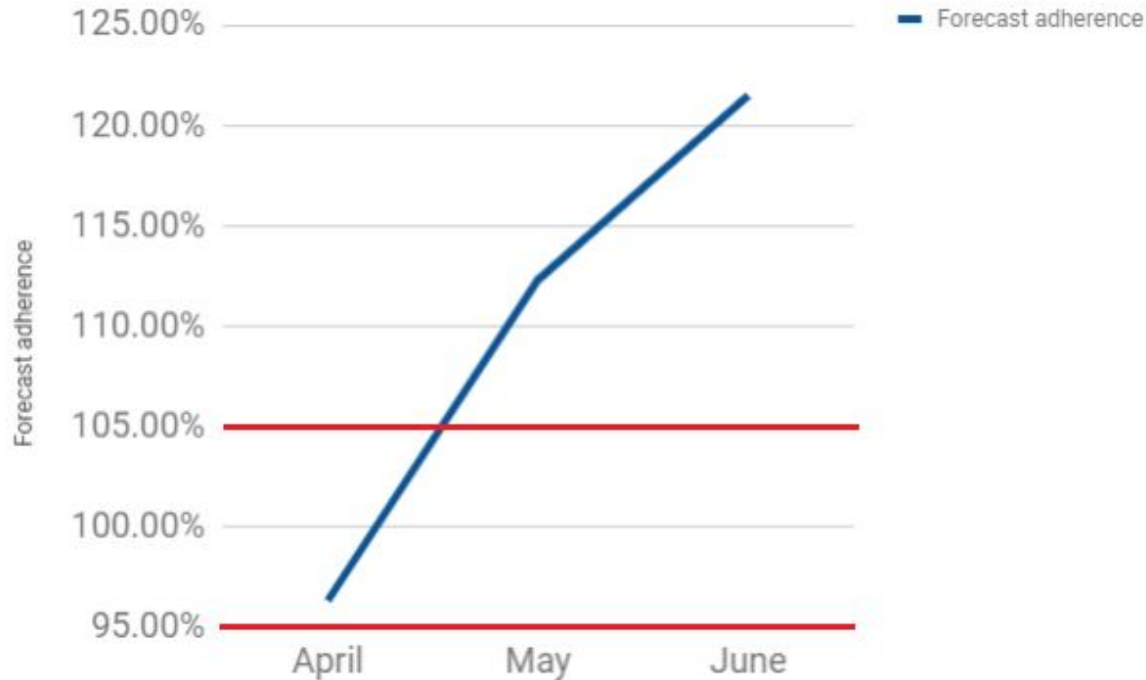
Volumes

- Contacts answered by the the consumer service (General consumer)

May 2017	May 2018
64,587	80,419

- While some of the difference is explained by post transition performance, the number of clients being responded to at present is significantly higher than in 2017

Volumes



- Forecast adherence measures how far above or below the service is to expected volumes
- To manage performance in line with targets we seek to be between 95% - 105% in terms of accuracy

Volumes

Measure	May 2018	June 2018
Abandonment	3.63%	6.38%
Average Handling time	11m 26s	10m 56s
Average speed to answer	36 seconds	49 seconds

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

Volumes

- 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
- 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

Centre Q&A and partner briefing document



July 2018

Mini-projects update



July 2018

Mini projects - case notes

- **Aim of project** - to ensure more consistency, better quality and higher standards of case notes across the service
- We have analysed partner feedback re case notes, file review forms and the quality forms around the areas that we mark on case notes and picked those elements out and make these the key drivers for the project
- 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
- 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
- We do plan to review again to ensure best practice is being undertaken

Mini projects - Traders

- **Background**

- Flare 21 (F21) the consumer service case handling system houses an extensive database of trader premises which feeds into enforcement and investigative work for a variety of service partners and also forms the foundation of the trader tracking process

- **Project aims**

- 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
- 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

Mini project Traders - Next steps

- We plan to run more group sessions to self identify what acceptable practice looks like and which elements contribute to this
- We will refine the current process document and agree some internal consistencies, agreeing where we can make improvements.
- We will create a video to share with all of the centres on how to search and how to create a trader record, with time comparison information to help educate advisers on the value of applying process correctly

Consumer service development plan



July 2018

What are our risks and challenges?



Declining demand for telephone and webforms



Inflexible training for advisers



Not offering a breadth of channels that clients might expect



Increased competition in providing client support and access to intelligence for partners



Ensuring our systems are up to date and fit for purpose

Service development priorities



Development Plan updates

- Website Intelligence
 - Scope of work agreed and scheduled by content team
 - Interim 'Geo-tagging' intelligence from Citizens Advice website
- 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 through new tools and methodologies is underway

Development Plan updates

- 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

Partner satisfaction and engagement activity



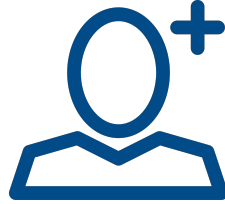
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How happy are those partners who use the service?



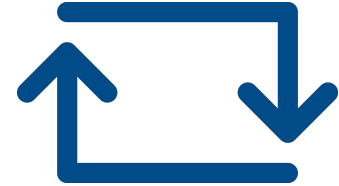
86%

were satisfied
or very
satisfied with
the service



92%

were satisfied
with our
approach to
engagement



92%

were satisfied
feedback is
responded to
within agreed
timescales

Partner satisfaction

- Other key results and improvements:
 - Depth of advice - 12% increase to 79%
 - Case notes - 19% increase to 66%
 - Information around traders - 8% increase to 67%
 - Training - 12% increase to 89%
- Full results were shared on the partner pages and through usual distribution channels
- We continue to work on driving improvement on areas that are below expected levels

Partner engagement

- A number of activities have recently taken place or are planned, including
 - CTSI Symposium
 - Welsh Trading Standards
 - ACTSO meeting
 - Regional meeting attendance
 - Team Leader away day opportunity
 - Members of our support teams visiting Trading Standards - Florrie Galloway

GDPR update



July 2018

Thank you



July 2018