

Trading Standards Working Group



20 April 2021

Agenda

- Welcome & introduction 10:30-10:35
- BEIS Update 10:35-10:40
- Consumer education and campaigns update 10:40-10:50
- Performance and Operations update 10:50-11:05
- Trader Enhancement, RAST and Trader Tracking update 11:05-11:20
- Transformation - 11:20 - 11:35
- Format of future meetings - 11:35-11:50
- AOB - All 11:50-12:00

BEIS Update



Carol Rice

Consumer Education Update



April 2021

Update

- **Green homes Grant** - we worked on two separate leaflets with two local Citizens Advice, West Sussex Trading Standards and the Scams Action Service,
 1. Raising Awareness of potential scams/ doorstep traders that purport to be from to the Green Homes Grant project
 2. How to use the Green Homes Grant voucher scheme and other grants available

It was disappointing that as we finalised both leaflets the scheme was axed. Although we have propose that we edit the scams leaflet to be a more generic scams/ rogue traders information leaflet.

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Scams Awareness - we are working with the campaigns team to produce materials for this year's campaign. The campaigns and comms team put together a meeting for us to network with a range of local Citizens Advice offices in order to discuss what materials will be useful.

Brexit - following on from the last meeting and Carol's suggestion (thanks Carol!) of contacting Emma Simpson, we now receive regular updates and are creating polls and draft materials for our workplace page for the local offices to get involved in.

Campaigns update



April 2021

Scams Awareness Fortnight 2021

- This year's campaign will focus on **financial services scams**
- We want to make sure people have the knowledge and skills they need to **spot a scam**, and empower them to **take action** when they see one.
- While hope there'll be a mix of digital and face-to-face campaigning, if safe and appropriate



What's next?

- Creating a package of resources for campaigning
- Reaching out to new organisations
- Reviewing potential activities in light of Covid-19 restrictions

Performance Operations & Covid-19 update



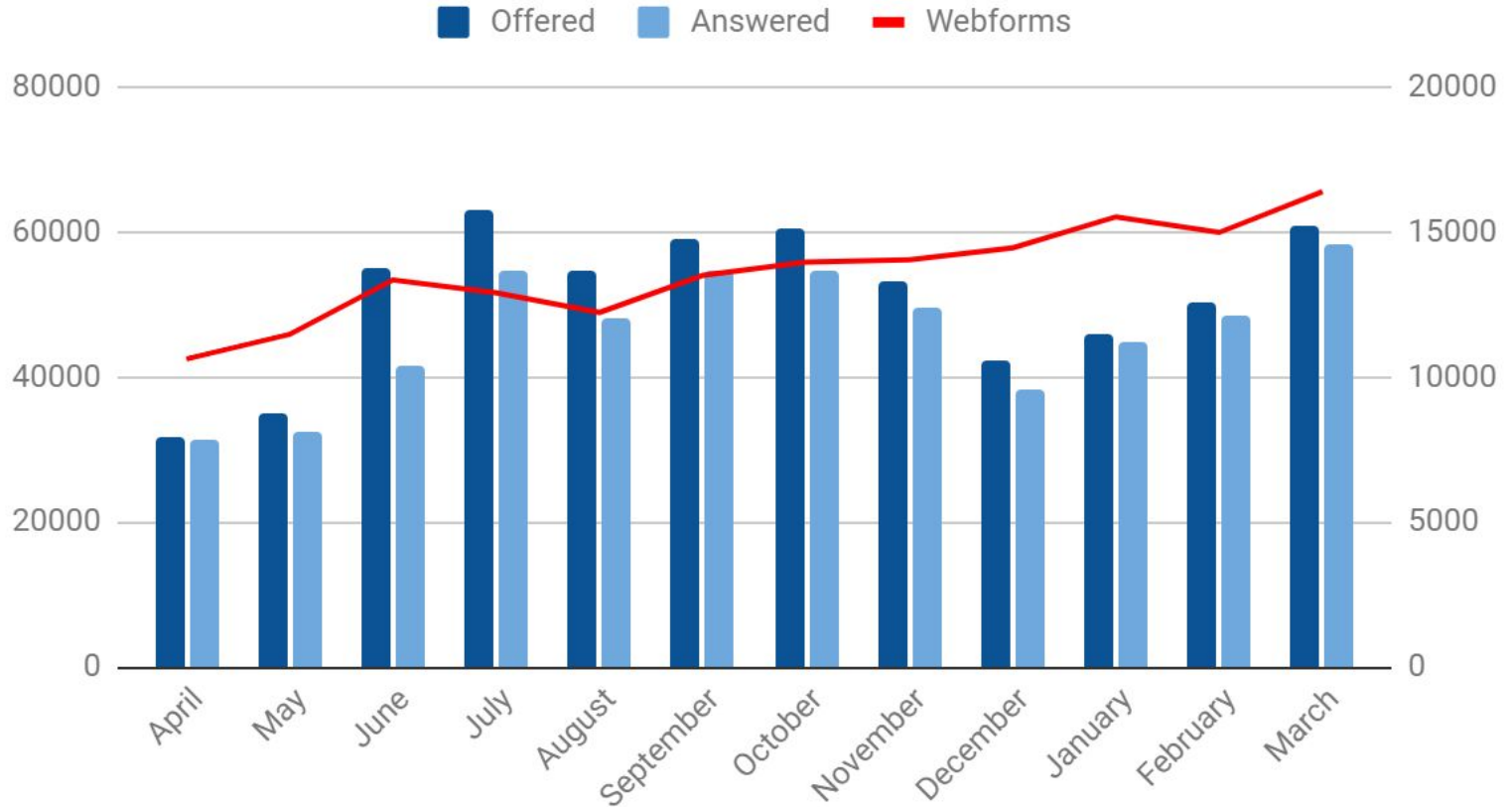
April 2021

Performance and Operations

- Overall the service handled **762,621** general consumer contacts throughout 2020/21, with quarters two and four being the busiest for the service
- This is an increase of **84,471** contacts when compared to the previous year with the majority of this uplift coming from webform and email contacts
- Client Satisfaction results were achieved for the full year
- Quality of advice consistently exceeded KPI levels for the full year
- Referral levels remained consistent across the year

Performance and Operations

Offered, Answered and Webforms



Covid-19 Update

- Delivery centres continue to be impacted by the pandemic
- During March, one delivery centre found that a number of staff (both advisers and management) had tested positive for Covid
- All staff were advised to get tested and the office was closed for two weeks to allow for deep cleaning
- Although significantly depleted in resource, the centre were still able to remain open with advisers that were able to, working from home
- As a result we have asked all delivery centres to review their internal contingency plans again, to ensure that they are prepared should a situation of similar scale occur

Challenging client behaviours

- A marked increase in challenging clients accessing the service mainly via telephone calls since January
- Lockdown during the winter has resulted in increased tensions for both staff and clients
- A new Dealing with Distressing calls process was designed to support staff along with resilience training.
- Unacceptable Behaviour Policy is on our contact us pages on the website to remind clients
- We are working on wording to be added to the IVR about being kind and considerate to staff
- Staff have referenced difficult clients in exit interviews
- A joined up approach across projects is being taken to tackle this situation more widely

Trader Enhancements, RAST and Trader Tracking



Jon Walters

Background

Significant investment with Civica to introduce a suite of changes to improve the effectiveness of:

- Trader search
- Trader creation
- Tracking / certificates

Objective is to improve the quality of the trader database and reduce duplicate records. Benefits include:

- Improved experience for front end users - fewer records to search
- Improved intelligence for referral partners
- Trader tracking - more effective which will support TS work
- All the above will improve the client journey and experience

Phase 1 - December

- Report created to enable more robust performance management of trader creation in centres
- Show the traders created by users as ratio of cases
- Highlights where trader already exists with same name and at least a partial postcode match
- Highlights if the existing trader has tracking / certificate attached
- Centres are using this report to support targeted coaching for advisers around trader search and creation

Phase 1 - January

New Flare functionality to reinforce correct process for trader search and creation:

- Prompt, forcing users to search for existing trader, before creating new record
- Prevent searches using minimal criteria
- Highlight trader tracks / certificate and place at top of search view to improve their visibility
- Ops ability to apply whitelist flag to traders preventing duplicates
- Restricted user role - won't allow new trader creation

Phase 1 - February

- Refined automated trader clean up jobs to better identify duplicates

Phase 1 - Benefits

- Analysis carried out to review the overall impact of the phase 1 changes in relation to trader creation. Covers 3 months prior to the first changes, to benchmark of the trader creation ratio prior to any changes.
- The overall trader - case creation ratio has significantly reduced since the introduction of the system changes. Volume of traders deleted by the refined clean up process has also significantly increased

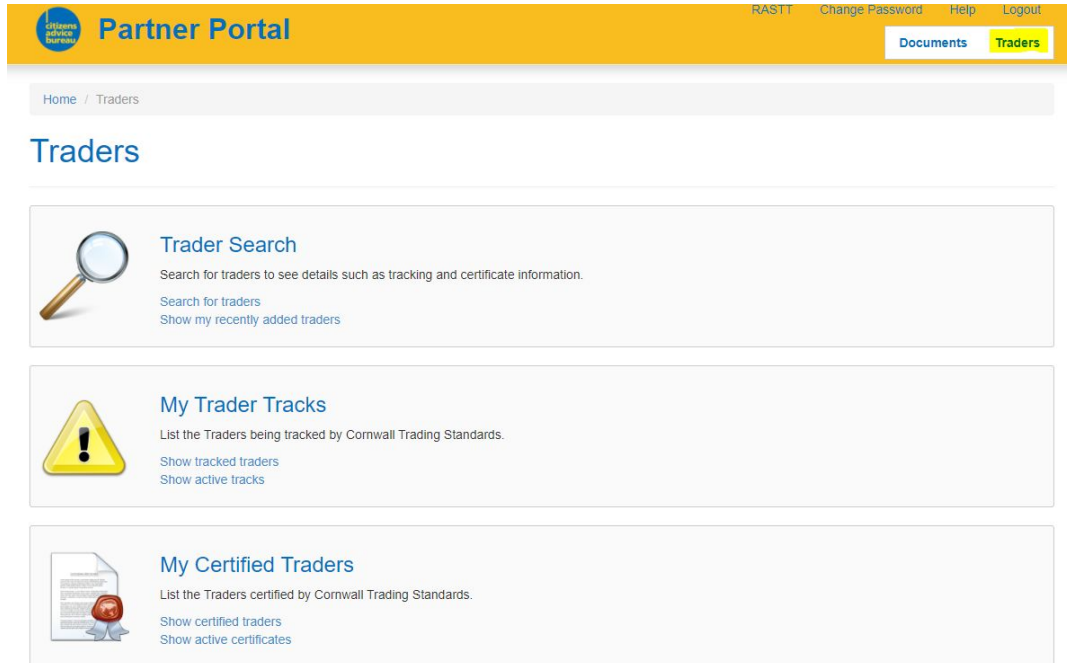
Month	Trader Creation to case ratio %
September	36%
October	36%
November	38%
December	38%
January	33%
February	27%
March	26%

Phase 1 - Benefits

- Positive feedback from delivery centres. Changes were introduced incrementally so end users could understand the objectives and embed behavioural changes
- The partner portal provides an insight previously very difficult to establish using our CMS. The intelligence is used for coaching and training purposes delivery centres have introduced additional and more dynamic tasks into system training material based on the insight from the report.
- Partners should also benefit from these changes as a streamlined database with fewer duplicate trader records improves the intelligence we share.

Phase 2 - March

- Functionality available in RAST for users to view / amend / delete existing trader tracks and certificates for their organisation
- Users also able to see existing traders on Flare
- TS involved in the QA process - we were able to incorporate several suggestions to improve the user experience



The screenshot shows the 'Partner Portal' interface. At the top, there is a yellow navigation bar with the 'Cornwall Trading Standards' logo on the left, the text 'Partner Portal' in the center, and links for 'RAST', 'Change Password', 'Help', and 'Logout' on the right. Below the navigation bar, there are two buttons: 'Documents' and 'Traders', with 'Traders' being the active page. A breadcrumb trail shows 'Home / Traders'. The main content area is titled 'Traders' and contains three sections:

- Trader Search**: Accompanied by a magnifying glass icon. Description: 'Search for traders to see details such as tracking and certificate information.' Links: 'Search for traders', 'Show my recently added traders'.
- My Trader Tracks**: Accompanied by a yellow warning triangle icon with an exclamation mark. Description: 'List the Traders being tracked by Cornwall Trading Standards.' Links: 'Show tracked traders', 'Show active tracks'.
- My Certified Traders**: Accompanied by a document icon with a red seal. Description: 'List the Traders certified by Cornwall Trading Standards.' Links: 'Show certified traders', 'Show active certificates'.

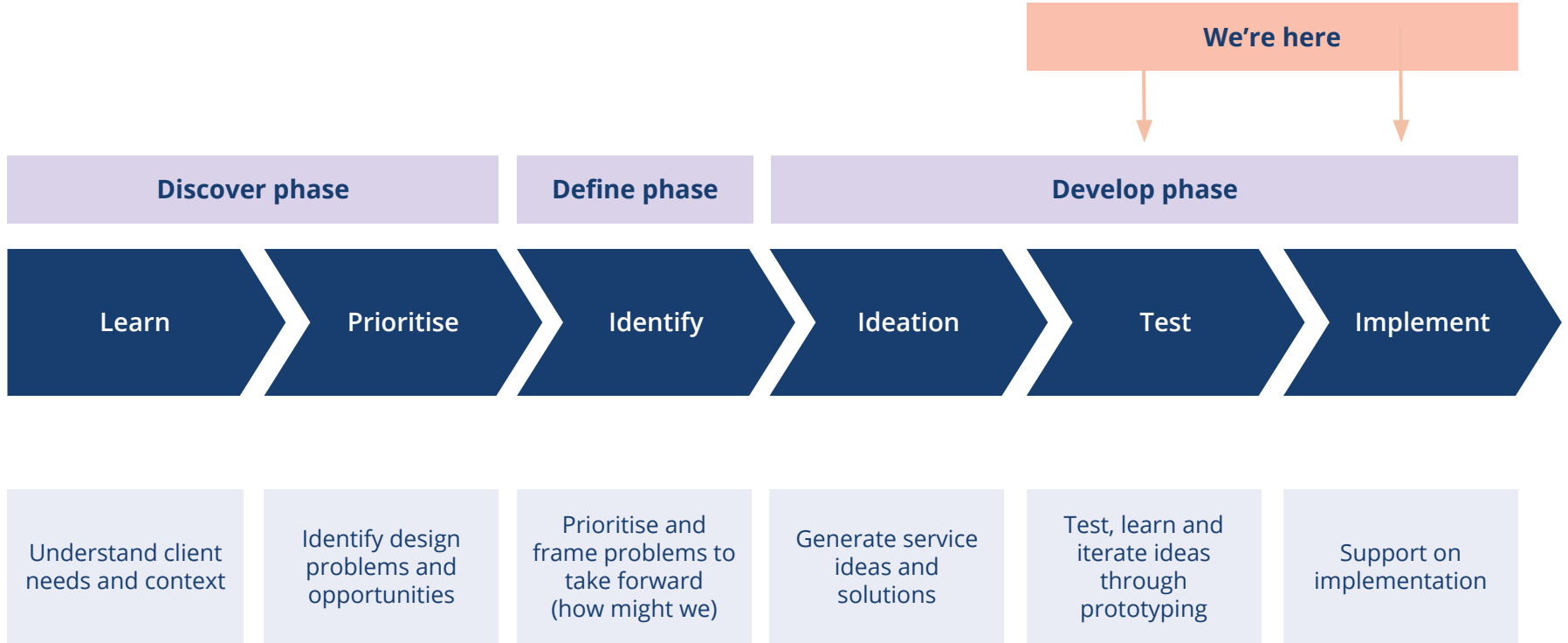
Phase 2 - March

- The new functionality available for users who have the new 'TrackingCertificates' permission added to their account.
- Requests to add the new permission need to come from the TS Business Administrator (BA) and can be requested by emailing: operations@citizensadvice.org.uk
- User guide and training video is available on Partner Pages - Business processes section:
<https://www.citizensadvice.org.uk/consumer-partners/consumer-partners/business-processes/>
- Positive feedback from those who have used the functionality. Previous process for tracking can still be used for high volumes but otherwise new functionality likely to be a better user experience

Consumer Service Transformation



Timeline and progress



Format of future meetings



Jon Walters

AOB

The logo for Citizens Advice, featuring the text "citizens advice" in a dark blue, sans-serif font, centered within a white speech bubble shape that has a small tail pointing downwards and to the left.

**citizens
advice**

AOB

- Date of next meeting Tuesday 20th July 2021
- Register my appliance week (April 26 - 30)

Thank you

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advice**