Written response to: Business & Transformation Scrutiny Panel

Resolution: That the Policy and Performance Officer seek written responses for circulation to the Panel as follows:

- Information on the breakdown of the number of emails fully answered by Customer Services, the number of holding responses and the number of emails passed on to be dealt with by other teams.

Written response from: Policy & Performance Officer / Customer Services Manager

Response:

Customer emails are handled by Salesforce. Whilst each reply is actioned individually by an advisor, each email is picked up and automatically assigned a Salesforce reference number. This also generates an auto-acknowledgement with target timescales and a description of other contact methods. This is important as any follow up comments, either by phone or email, are collated on the same record as the customer knows their specific reference number.

Operationally these emails come to our advisors via an email queuing system that is integrated into Salesforce. It acts like a central point where emails are handed to active advisors in order of timescale. This has enormous benefits over managing emails using a standard mailbox, for the following reasons:

- There is no duplication of work as advisors can only access one email at any one time
- Time is saved by only using one system
- There is no need to manage storage of emails as this is managed by Salesforce
- Advisors can deal with emails and telephone calls simultaneously
- Email handling is reportable
- Data entry of email information is automated

Additionally, we have automated workflows for specific keywords that will bypass our queuing system completely. This is focused at non-customer facing departments as Customer Services want to ensure customer queries are dealt with consistently. For example, the keyword 'Remittance Advice' will go directly to finance because of its very specific nature.

Emails are handled in exactly the same way that telephone calls are. Any function that Customer Services can complete at first point of contact is done and closed. Any email that requires input from another department is forwarded on. We are unable to monitor first time

resolution at this point as we cannot add that option to our current systems. However, this is very much on the wanted list and will be a key request of future contact management systems.

Under no circumstance do we send holding emails from Customer Services. If a query has been passed to another department, they may well contact a customer for any time extension. We are unable to monitor this. Any query that sits within the Customer Service remit is being responded to within the KPI. This includes emails where we respond to ask for further information. An email isn't closed until a positive action has been performed.

To put this achievement into perspective, prior to the introduction of the Omni-Channel email queuing system when emails were managed using a standard mailbox, we advised that we would respond to an email within 5 working days. This was largely the case. Although emails were not reportable before automation, I believe our email handling time as improved by up to 72hrs. Additionally, customers have a reference number when following up on any query.

A Customer Services update report will be presented to the next Panel meeting and will expand on this response.

Date: 6/9/19