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Performance Management Framework

for publicly funded contact centres

Overview

UPDATED

Version 2

Issued by the Contact Council

Overview

This document introduces the performance management framework of indicators for publicly funded contact centres and sets out the steps to implement the indicators in contact centres.

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Acknowledgements

The Contact Council wishes to acknowledge the contributions made in developing the performance management framework including all those who attended recent consultation workshops in Birmingham, Wigan, Newcastle and London.

Further information

For further information relating to the the Contact Council and the contents of this document please go to:
www.cabinetoffice.gov.uk/public_service_reform/contact_council

Context

Professional contact function

In December 2006 Sir David Varney issued his review of public sector service delivery. His report, '*Service transformation: A better service for citizens and businesses, a better deal for the taxpayer*' concludes that an opportunity exists to provide better public services for citizens and businesses and to do this at lower cost.

His report makes a series of recommendations, including a number which could set contact centre management and operations as a key profession in the public sector, within the context of a more integrated overall approach to telephone, electronic and face-to-face contact.

Sir David's recommendations complement the messages about understanding, involving and responding better to local people that emerge from the Local Government White Paper, the Lyons Review and documents such as the Local Government Association's 'Closer to People and Places.

The report went on to recommend clear measures to improve the performance of contact centres. Government welcomed the report and its recommendations.

A chance to change

The Contact Council recognises key challenges faced by the public sector in providing a modern customer contact function for public services:

1. Customers access a range of public services through different contact centres. A bad experience with one is a bad impression of all. Customers should be able to expect the same high standard of contact wherever they access public services;
2. Contact centres monitor the 'vital signs' of many public services, often being first to notice performance issues and failures in the customer journey. Contact centres can and should play a more central role in shaping and evolving end-to-end service delivery through evidence-based input to the overall service lifecycle;
3. The *contact* function, and specifically contact centres, needs to establish a firm presence at senior levels of public sector management;
4. Public sector today possesses some of the best contact centre professionals in the UK. But it needs more. Developing from within must be a priority to modernising the public services *contact* function;
5. If the *contact* function is to evolve to play a central role in public service delivery then it needs to provide evidence-based, accurate assessments of all aspects of the services it delivers including comparison with the past performance and forecasts for the future;
6. The UK contact centre profession is competitive. Getting and keeping the right people is a priority. Public sector must continue to make its *contact* function and contact centres the career choice of high-calibre professionals;
7. Many contact centres are already running at peak capacity levels. Demand continues to climb. Headroom to cope with this demand will only come from the elimination of avoidable contact and the integration and use of other channels to share the load. Contact centres must learn these techniques from each other;
8. It is already recognised that much closer joining up between central and local government contact centres is needed if we are to truly improve customer experiences of public services. Joining-up needs to be underpinned by common measurement systems.

Measures that help

Words to actions

Government responded swiftly to the Varney recommendations.

In spring 2007 HM Treasury requested that departments appoint Contact Directors with strategic and operational responsibility for customer contact in their organisations.

The Contact Council of Contact Directors met for the first time on March 8th and agreed its near-term remit, which included compiling a set of contact centre performance indicators.

Having consulted widely, the Council, at its 2nd meeting on 25th April, endorsed a set of performance indicators and a roll-out plan for publicly funded contact centres. Contact Centres were asked to submit a PMF return in a dry-run exercise in October.

The dry-run submissions were used to analyse areas for improvement in the PMF. The Contact Council consulted with customer contact managers in 4 workshops in Birmingham, Wigan, Newcastle and London in November/December. Views from these workshops were analysed and used to update the PMF Detailed Definition.

Why measure?

Performance Indicators in public sector contact centres are nothing new. Managers have been measuring Attrition, Absence, and Call Volumes (to name a few) for years. What is new is that contact centres are coming together to measure the same indicators in a similar way and to share that information in a controlled way. Measuring and sharing common indicators will help contact centres to:

1. Better understand the drivers of staff and customer satisfaction and develop measures to improve both;
2. Improve on the value-for-money efficiency of contact centres;
3. Share best practice methods and experiences across a large group of contact centre professionals;
4. Understand what best performance looks like in public sector, who is achieving it and how. Find where help is needed and who is best placed to provide it;
5. Help build a community of contact centre professionals, managers and staff, and strengthen the profession in public sector;
6. Have a common language around contact centre operations and understand the real differences between contact centres in different businesses and the impact on operations and performance;
7. Develop better indicators together. The current set is a starting point. These will evolve with more and more input from contributing contact centres;
8. Have the most definitive view to date of the demands on contact centres and the performance of underlying public services.

How measures will be used

The Council has considered the use of indicator data carefully. The agreed approach is to ask contact centres to return certain indicator data to the Contact Council. In turn, the Council will return to contributing contact centres a quarterly report setting out the general performance trends, highs and lows, across the contact centre estate. Additionally, contact centres which have performance issues in a specific area will be invited to best practice and experience sharing sessions with corresponding 'high-performers'.

Indicators of performance

A performance management framework of indicators

Departments, agencies and councils have contributed their contact centre metrics and have developed a common set for the public sector. Of the indicators gathered, an overwhelming number were quantitative in nature. The current version of the framework was enhanced with several qualitative indicators.

The framework of performance indicators is set out in the 'Detailed definition' document on this website.

Fundamental to the development of the framework was the need to balance the three natural tensions in contact centre management; the demands of customers, the needs of staff and delivering value for money to the taxpayer.

For each area, an additional balance between quantitative and qualitative measurement must be maintained.

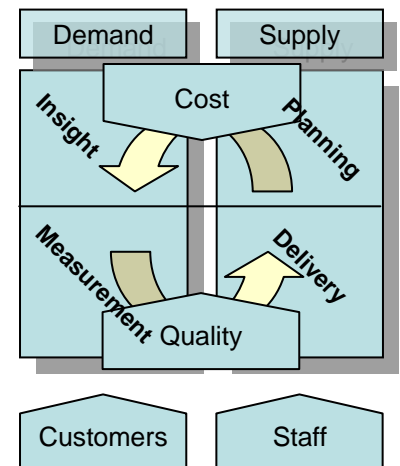
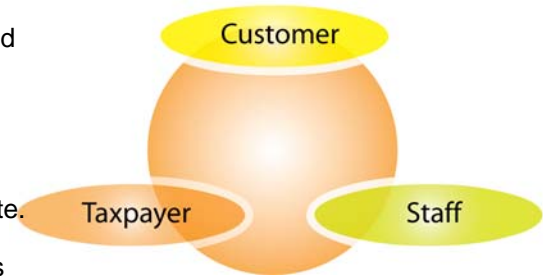
Finally, the current set of indicators also seeks to balance those activities which determine contact performance which are under the direct control of the contact centre and those that are managed by the business.

An over-arching assumption to the framework is that it is easy to understand, implement and measure. Though there are 24 performance indicators in the framework, several depend on the same pieces of data and/or are derived from other measures.

Many of the quantitative indicators will be already used by contact centres. It is estimated that the bulk of the effort will be focused on implementing and measuring the qualitative. This is a function of the maturity of the current contact centre landscape in public sector.

It is worth noting that these performance indicators are measures and **not** targets.

The 24 indicators assess performance against 4 contact centre competencies; Insight, Planning, Delivery, Measurement.



Getting started

Implementing the measures

The Contact Council agreed the following action plan.

1. The performance management framework (V.5) is fit-for-purpose and should be released as-is in December 2007;
2. Contact centres will need to review each indicator and understand what, if anything, needs to be done to their existing measurement structures to adapt to this framework. Council members and their senior managers can help and advise contact centre managers;
3. Participating contact centres should aim to submit their quarterly indicators to the Contact Council within one month of the end of the previous quarter. For example, the PMF submission for the quarter October-December 2007 the (i.e. 31st December in the next case) will be expected by 31st January 2008;
4. The Council secretariat will assess the indicator data submitted and will issue to all participants a general overview of performance. The overview is intended to help contact centres understand general performance trends across the public sector;
5. The Council will assess areas of recurring weakness in public sector contact centres and will facilitate workshops to provide help to those that need it. These workshops will include input from the better performing centres on best practice in a specific area of measurement;
6. Information gathered from contact centres should also be used to provide an annual report on the public sector *contact* function;
7. Contact centre managers will have an opportunity to improve the performance indicators at post submission workshops.

What you should return

By the 31st January you should return, by email, the following to the Contact Council (contactcouncil@cabinet-office.x.gsi.gov.uk):

1. One PMF return per contact centre completed as much and as accurately as possible;
2. Any supporting information or comments about your input.

Getting help

Please contact your Contact Director or the Contact Council at contactcouncil@cabinet-office.x.gsi.gov.uk

Frequently Asked Questions

The following answers to stakeholder FAQs might answer some of your questions:

What will the Contact Council do with my reported performance indicators?

The indicator data will be used to raise the standard of contact centres by helping individual centres to improve. Additionally, data will be used to summarise the performance of the public sector contact centre estate.

Why should we measure?

You don't have to. The objective of these measures is to build the contact centres profession in public sector. They are a means to an end. If you do not get as much out as you put it then it would make no sense to use the indicators.

What if I can only measure some of these indicators?

Mark indicators that you cannot measure in your return as a 'nil return' explaining the reason for not measuring.

Why can the indicators not measure Revs and Bens processing?

We have looked to keep measures meaningful to a wide audience while at the same time focused on specific areas of contact centre competence.

We measure some of these measures differently. Should we adopt these?

Participating contact centres have already shown that they can align to this set of common indicators. The detailed pack identifies some of those that are already using the common measures.

Has local government contributed to the framework?

Yes. The Local Government Benchmark Group, representing over 80 contact centres, and individual local authorities have contributed to the framework. IDeA has also provided valuable input.

How does this tie in with the Local Government NI14?

The Contact Council has contributed the latest updates of the Avoidable Contact indicator from the PMF to DCLG as part of their consultation on NI14.

This system will introduce a huge overhead to our organisation

We have tested this with many of the contributing organisations in the October dry-run. To date we cannot see this framework adding too much effort in addition to existing measurement workload.

Is there funding available to implement these measures?

It is expected the funded contact centres are already measuring their performance as a matter of course.