Agency Priority Goal | Action Plan | FYs 2022–2023 | FY 2022 – Q3

Improve the National 800 Number Service

Goal Leader: Erik Jones, Assistant Deputy Commissioner, Office of Operations
Deputy Goal Leader: Yateesh Katyal, Deputy Associate Commissioner, Office of Systems Operations and Hardware
Goal Overview

Goal statement
Improve the customer experience by reducing the average speed of answer\(^1\) on the National 800 Number.

- By September 30, 2023, achieve an average speed of answer of under 12 minutes, including implementation of estimated wait time and call back options.\(^2\)

Problem to Be Solved
- Customers who contact our National 800 Number experience lengthy delays waiting to speak with an agent, particularly during our peak calling periods.\(^3\)
- Our current National 800 Number systems experience regular disruptions and the temporary loss of self-service and management information tools while we transition to a new phone system by the end of the first quarter of FY 2023.

What Success Looks Like\(^4\)
- Improved capacity for answering calls by maintaining staffing levels and improved training for agents and supervisors.

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\(^1\) Average speed of answer (ASA) is measured from the time the call enters the queue until the call is answered by an agent. It does not include time spent in self-service.

\(^2\) This target is also a budgeted workload measure.

\(^3\) Peak calling periods are typically October through March and from 11 a.m. to 2 p.m. Eastern time.

\(^4\) Demonstrates progress towards achieving our Agency Strategic Plan’s Build a Customer-Focused Organization and Improving the Accuracy and Administration of Our Programs strategic objectives.
• Improved customer experience by providing timely and accurate service when calling our 800 number and increasing our ability to resolve caller questions during their initial interaction with us.
• Fully implementing our new phone system resulting in consistent systems performance, enhanced self-help options, and improved access to real-time management information capabilities.
### Tracking the goal

#### Goal target(s)

<table>
<thead>
<tr>
<th>Achievement statement</th>
<th>Key indicator(s)</th>
<th>Quantify progress</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Repeat the achievement statement from the goal statement on the previous slide</td>
<td>A “key performance indicator” measures progress toward a goal target</td>
<td>These values enable us (and you!) to calculate % complete for any type of target</td>
<td>When is there new data?</td>
</tr>
<tr>
<td><strong>By…</strong></td>
<td><strong>We will…</strong></td>
<td><strong>Name of indicator</strong></td>
<td><strong>Target value</strong></td>
</tr>
<tr>
<td>09/30/23</td>
<td>Achieve an average speed of answer less than 12 minutes</td>
<td>National 800 Number Average Speed of Answer</td>
<td>12 minutes</td>
</tr>
<tr>
<td>09/30/23</td>
<td>National 800 Number Agent Busy Rate</td>
<td>1%</td>
<td>0.2%</td>
</tr>
<tr>
<td>09/30/23</td>
<td>National 800 Number Agent Calls Handled</td>
<td>36,000,000</td>
<td>0</td>
</tr>
</tbody>
</table>

*As of 09/30/2021

5 Value represents fiscal year to date performance as of the end of the most recent quarter.
Goal Team

Leadership Team

Erik Jones, Assistant Deputy Commissioner, Office of Operations
Goal Leader

Yateesh Katyal, Deputy Associate Commissioner, Office of Systems Operations and Hardware Engineering – Deputy Goal Leader

Implementation Team

Associate Commissioner (Office of Operations)
Office of Customer Service

Associate Commissioner (Office of Systems)
Office of Systems Operations and Hardware Engineering

Division Director (Office of Operations)
Office of Customer Service, Division for Contact Center Services

Regional Commissioners (Office of Operations)
Regional Offices (excluding Boston and Denver)
Goal Strategies

Implementation Strategies

- Implement our new phone system, known as the Next Generation Telephony Project (NGTP) through continuous monitoring of vendor activities and milestones.
- Improve call handling by using an improved hiring process that recruits and retains quality candidates in a competitive labor market.
- Maximize agent performance with an improved and updated new agent training curriculum and improve supervisor support through a new training call center supervisor curriculum.
- Reduce scam-related call volumes through our public education campaign.

External Considerations

- The vendor’s ability to implement NGTP timely and maintain quality systems performance is key to our ability to meet our goal, and we are closely monitoring implementation.
- Following NGTP implementation, the vendor must provide us with fully functioning caller management features such as call-back assistance, estimated wait time, express routing of calls and more comprehensive automated self-service options.
- Labor market factors outside our control could result in staffing shortages in our call centers and challenges in answering calls.
- An unanticipated increase in the number of calls may affect our average speed of answer.
Key indicators

**Primary Indicator:** Average Speed of Answer

**National 800# Average Speed of Answer**
(Monthly Average Results)

<table>
<thead>
<tr>
<th></th>
<th>FY 2021</th>
<th>FY 2022</th>
<th>FY 2023 Target (&lt;12.0)</th>
</tr>
</thead>
<tbody>
<tr>
<td>OCT</td>
<td>19.4</td>
<td>20.3</td>
<td></td>
</tr>
<tr>
<td>NOV</td>
<td>22.4</td>
<td>26.7</td>
<td></td>
</tr>
<tr>
<td>DEC</td>
<td>36.2</td>
<td>27.8</td>
<td></td>
</tr>
<tr>
<td>JAN</td>
<td>18.8</td>
<td>39.9</td>
<td></td>
</tr>
<tr>
<td>FEB</td>
<td>15.0</td>
<td>38.3</td>
<td></td>
</tr>
<tr>
<td>MAR</td>
<td>13.6</td>
<td>38.7</td>
<td></td>
</tr>
<tr>
<td>APR</td>
<td>5.2</td>
<td>36.0</td>
<td></td>
</tr>
<tr>
<td>MAY</td>
<td>8.5</td>
<td>30.5</td>
<td></td>
</tr>
<tr>
<td>JUN</td>
<td>7.9</td>
<td>32.7</td>
<td></td>
</tr>
<tr>
<td>JUL</td>
<td>8.9</td>
<td>8.9</td>
<td></td>
</tr>
<tr>
<td>AUG</td>
<td>6.2</td>
<td>6.2</td>
<td></td>
</tr>
<tr>
<td>SEP</td>
<td>12.5</td>
<td>12.5</td>
<td></td>
</tr>
</tbody>
</table>
FY 2021 shows increased 800 Number agents and continued improvement in the average speed of answer.

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FY 2021 shows increased 800 Number agents and continued improvement in the average speed of answer.
Key Indicators

**Secondary Indicator:** Agent Busy Rate

This is a budgeted workload measure.

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7 This is a budgeted workload measure.
In FY 2021 while operating on the CARE 800 Number Platform, we were able to largely eliminate the use of a busy signal and allow all calls onto the platform.
**Key Indicators**

**Secondary Indicator:** Agent Calls Handled

### National 800 Number Agent Calls Handled

- **OCT:** FY 2021: 2.54, FY 2022: 2.23
- **NOV:** FY 2021: 2.38, FY 2022: 2.16
- **DEC:** FY 2021: 2.47, FY 2022: 2.14
- **JAN:** FY 2021: 2.58, FY 2022: 2.12
- **FEB:** FY 2021: 3.11, FY 2022: 1.96
- **MAR:** FY 2021: 2.28, FY 2022: 2.28
- **APR:** FY 2021: 2.81, FY 2022: 2.29
- **MAY:** FY 2021: 2.24, FY 2022: 2.24
- **JUN:** FY 2021: 2.35, FY 2022: 2.35
- **JUL:** FY 2021: 2.73, FY 2022: 2.34
- **AUG:** FY 2021: 3.09, FY 2022: 2.56
- **SEP:** FY 2021: 2.59, FY 2022: 2.59

(Values in millions, with FY 2021 in blue and FY 2022 in orange.)
Key Indicators

Historical Data:

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Agent Calls Handled</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY 2016</td>
<td>31,930,606</td>
</tr>
<tr>
<td>FY 2017</td>
<td>30,919,908</td>
</tr>
<tr>
<td>FY 2018</td>
<td>26,876,099</td>
</tr>
<tr>
<td>FY 2019</td>
<td>28,464,527</td>
</tr>
<tr>
<td>FY 2020</td>
<td>30,119,002</td>
</tr>
<tr>
<td>FY 2021</td>
<td>31,246,009</td>
</tr>
</tbody>
</table>
**Key milestones**

## Milestone Summary

<table>
<thead>
<tr>
<th>Key Milestone</th>
<th>Milestone Due Date</th>
<th>Milestone Status</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete transition to Unification Platform</td>
<td>Q1, FY 2022</td>
<td>Not Met</td>
<td>The transition to the Unification Platform was completed except for Employees with Disabilities. For limited periods, we returned agents to the prior platform for stability purposes.</td>
</tr>
<tr>
<td>On-board latest round of agent hires (~ 280)</td>
<td>Q2, FY 2022</td>
<td>Met</td>
<td>273 new agents on-boarded</td>
</tr>
<tr>
<td>Complete New Agent Training Rollout</td>
<td>Q3, FY 2022</td>
<td>Not Met</td>
<td>Currently adjusting training in response to feedback from field offices. Revised rollout planned for late Q4, FY 2022, or early Q1, FY 2023.</td>
</tr>
<tr>
<td>Complete New Supervisor Training Rollout</td>
<td>Q4, FY 2022</td>
<td>On-Track</td>
<td></td>
</tr>
<tr>
<td>NGTP Implementation</td>
<td>Q1, FY 2023</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reimplement Customer Satisfaction Survey</td>
<td>Q2, FY 2023</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Integrate Customer Engagement Tools</td>
<td>Q3, FY 2023</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Implement Interactive Voice Response Enhancements</td>
<td>Q4, FY 2023</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reimplement Agent Scorecards</td>
<td>Q4, FY 2023</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
We continue to experience challenges in our National 800 Number performance. Our third quarter fiscal year to date Average Speed of Answer (ASA) was 33.4 minutes. While this is a slight decrease from the prior quarter, it remains an increase of 18.4 minutes above quarter three of FY 2021. Our fiscal year to date Agent Busy Rate (ABR) remained at 6.9 percent, but each month of the third quarter showed significant improvement over second quarter performance. However, the FY 2022 quarter three ABR is still 6.6 percent higher than quarter three of FY 2021. Although we were able to handle 19.8 million calls through the third quarter of this fiscal year, this was about 3.2 million fewer calls compared to the third quarter of FY 2021. The lack of Call Back Assistance (CBA) since April 2020 has had a direct impact on increasing ASA. When CBA was an option for callers, many took advantage of it which prevented them from waiting on hold to speak to an agent. This feature will be reinstated with the implementation of NGTP.

Instability in the interim Unification Platform in the first half of FY 2022 eased in the third quarter, reducing agent downtime and improving both ASA and ABR. We continue to work with our vendor to operate the Unification Platform while also developing the longer-term NGTP solution. Throughout the third quarter of FY 2022, the NGTP vendor continued to work toward implementation.

Additionally, the hiring difficulties we experienced in the second half of FY 2021 continue to affect performance. We continue to encounter challenges retaining new agents. This is resulting in higher attrition than expected. While we were able to onboard 900 new agents through the end of quarter three, we are still more than 800 agents short of our staffing goal of 5,220. We remain focused on achieving improved staffing levels among our National 800 Number agents.
Data accuracy & reliability

Our National 800 Number data combines data management tools from two vendors. There are data and system limitations while operating in a dual environment, including data reliability issues. Our data reliability will greatly improve once we fully transition to the NGTP in quarter one of FY 2023.

Within the Office of Operations, the Office of Customer Service monitors daily data and performance. Due to short data retention periods, we are working to collect and preserve historical data on a regular basis.

We are working to restore our National 800 Number scorecards to highlight efficiency and effectiveness for the agents and at the site. Some of the metrics include:

- Customer Satisfaction
- First call resolution
- Avg Logon hours (agent)
- Avg Calls Handled per hour (agent)
- After Call work Time
- Hold Time Percentage
- Aux time (off phone time)
**Stakeholder / Congressional Consultations**

**Internal Stakeholders:**

**Employees:** Our National 800 Number Network Agents are dedicated public servants committed to providing accurate and timely service to the public.

**Office of Human Resources (OHR):** We work with OHR to hire new employees and develop and deliver training.

**Office of Acquisitions and Grants (OAG):** We collaborate with OAG to address acquisition planning and procurement needs, including purchasing major information technology services and products to support our communication platforms.

**Office of the Inspector General (OIG):** We collaborate with OIG to address spoofing and fraudulent Social Security schemes targeting our callers.

**Office of Systems (OS):** We work closely with OS to execute the NGTP contract and task order to manage vendor activities for development and deployment of the NGTP solution, including N8NN.
External Stakeholders

The Public: The public should have a positive customer experience when calling the National 800 Number. Existing customer feedback surveys continue to show that wait time is one of the biggest drivers of customer satisfaction.

Congress: Congress maintains an interest in service delivery options for the public—the National 800 Number, face-to-face, and online services.

Labor Union Organization: The American Federation of Government Employees represents our National 800 Number agents and provides input to leadership.

Advocacy Groups: These organizations advocate for the rights of people seeking our services and encourage secure and convenient service delivery options such as National 800 Number services.