

Crown Commercial Service

Call Off Order Form for Management Consultancy Services

Independent Review of Customer Service

Project_4503

FRAMEWORK SCHEDULE 4

CALL OFF ORDER FORM

PART 1 – CALL OFF ORDER FORM

SECTION A

This Call Off Order Form is issued in accordance with the provisions of the Framework Agreement for the provision of **Lot 4 Strategic Consultancy Services** dated **04 September 2018**.

The Supplier agrees to supply the Services specified below on and subject to the terms of this Call Off Contract.

For the avoidance of doubt this Call Off Contract consists of the terms set out in this Template Call Off Order Form and the Call Off Terms.

Order Number	TBC
From	The Education and Skills Funding Agency (ESFA) on behalf of the Secretary of State for Education ("CUSTOMER")
To	PA CONSULTING SERVICES LIMITED ("SUPPLIER")
Date	23rd September 2020 ("DATE")

SECTION B

1. CALL OFF CONTRACT PERIOD

1.1.	Commencement Date: 23rd September 2020
1.2.	Expiry Date: End date of Initial Period: 22nd December 2020 End date of Extension Period: 22nd December 2021 should the Department exercise its option to extend Minimum written notice to Supplier in respect of extension: 30 days

2. SERVICES

2.1.	Services required: As detailed in Schedule 1 of this Call Off Order Form
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3. PROJECT PLAN

3.1.	Project Plan: As detailed in Schedule 2 of this Call Off Order Form
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4. CONTRACT PERFORMANCE

4.1.	Standards: As detailed in Schedule 1 of this Call Off Order Form
4.3	Critical Service Level Failure: Not applied
4.4	Performance Monitoring: As detailed in Schedule 1, paragraph 8 of this Call Off Order Form
4.5	Period for providing Rectification Plan: In accordance to Clause 39.2.1(a) of the Call Off Terms

5. PERSONNEL

5.1	Key Personnel: Rob Mettler – assignment lead Erika Hawker – best practice innovation, field research and workshop delivery Ian Matthias – overall responsibility for delivery
5.2	Relevant Convictions (Clause 28.2 of the Call Off Terms): Not applied

6. PAYMENT

6.1	Call Off Contract Charges (including any applicable discount(s), but excluding VAT): In Annex 1 of Call Off Schedule 3 (Call Off Contract Charges, Payment and Invoicing) As per the customer's requirements, the supplier will provide the following roles:
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Name(s)	Grade	Daily Rate £ (exc VAT)	Number of days	Total £ (exc VAT)	Comments
Rob Mettler	Managing Consultant / Associate Director / Director	£2,000	9	£18,000	
Erika Hawker	Principal Consultant	£1,550	35	£54,250	
Saana Karki	Principal Consultant	£1,550	8	£12,400	
Jack Beswick	Senior Consultant / Manager	£1,100	25	£27,500	
Ian Matthias	Partner / Managing Director	£2,200	4	£8,800	
Tom Snoxell	Managing Consultant / Associate Director / Director	£0	3	£0	*daily rate is £2,000 but will not charging for Tom's time
Atan Burrows	Partner / Managing Director	£0	3	£0	*daily rate is £2,200 but will not be charging for Atan's time
Vineet Khanna	Managing Consultant / Associate Director / Director	£0	3	£0	*daily rate is £2,000 but will not be charging for Vineet's time
TOTAL				90	£120,950

The following pricing will apply for each deliverable:

Full details of each deliverable are listed at Section 3 of Schedule 1 Services Required of this Call Off Order Form.

Milestone	Deliverables		
1	Agreed plan	5%	£ 6,047.50
2	Report on existing customer service provision	30%	£ 36,285.00
3	Definition of customer service	15%	£ 18,142.50
4	Final written report containing customer service model	25%	£ 30,237.50
5	Channel and KPI Strategy	10%	£ 12,095.00
6	Recommendations for organisation design	15%	£ 18,142.50
		100%	£120,950.00
Total		£	120,950

6.2 Payment terms/profile

In Annex 2 of Call Off Schedule 3 (Call Off Contract Charges, Payment and Invoicing)

Method of payment - BACS

Payment shall be made in accordance with the following payment mechanism based on the agreed deliverables listed at section 6.1 Call Off Contract Charges of this Call Off Order Form
Invoices shall be submitted to the project coordinator in arrears in two stages.

Stage 1 - upon successful completion and acceptance of the following milestones:

1. An agreed schedule of work/work plan

	<p>2. A written report detailing activity undertaken by the provider to complete the review including dates and names of individuals who have been engaged in the review and records of findings and discussions/interviews conducted as part of the review.</p> <p>3. Written definition of what is meant by customer service within ESFA based on findings from the review and industry best practice.</p> <p>Stage 2 - upon successful completion and acceptance of the following milestones:</p> <p>4. Formal final written report with full analysis and recommendations based on industry best practice on proposed customer service model. Include considerations and rationale for recommendations. Formal meeting and presentation of findings and recommendations to CEDD Director and Senior Team (attendees to be determined) Supporting copy of presentation slides/documentation</p> <p>5. A formal document proposal (this may be included in the report produced for milestone 3) on the strategy for what customer service should be delivered through which channel including recommendations on the creation of a quality framework for measuring customer service. This is so that metrics are applied across all directorates, consistency in what is recorded and reported on and based on customer feedback. KPIs to measure success to include:</p> <ul style="list-style-type: none"> • Customer Sentiment • Cost to Serve • Outcomes and Key Results • User satisfaction – ease of use, timely, reliable, right first time (existing Government indicators) <p>6. A formal written report and supporting diagrams/charts (this may be included in the report produced for milestone 3) to illustrate recommendations on organisation design for an ESFA customer service model.</p> <p>Payment can only be made following satisfactory delivery of pre-agreed certified deliverables.</p> <p>Before payment can be considered, each invoice must include a detailed elemental breakdown of work completed and the associated costs.</p>
6.3	<p>Reimbursable Expenses: Not permitted</p>
6.4	<p>Customer billing address (paragraph 7.6 of Call Off Schedule 3 (Call Off Contract Charges, Payment and Invoicing)):</p> <p>The ESFA Accounts Payable, ASC Purchasing Cheylesmore House, Quinton Road Coventry, CV1 2WT</p>

	<p>All invoices should be emailed directly to: accountspayable.OCR@education.gov.uk</p> <p>All invoices must quote the PO number in full</p>
6.5	<p>Call Off Contract Charges fixed for (paragraph 8.2 of Schedule 3 (Call Off Contract Charges, Payment and Invoicing)):</p> <p>3 Call Off Contract Months from the Call Off Commencement Date, which can be extended for a further 12 months by agreement.</p>
6.6	<p>Supplier periodic assessment of Call Off Contract Charges (paragraph 9.2 of Call Off Schedule 3 (Call Off Contract Charges, Payment and Invoicing)) will be carried out on:</p> <p>Not applied</p>
6.7	<p>Supplier request for increase in the Call Off Contract Charges (paragraph 10 of Call Off Schedule 3 (Call Off Contract Charges, Payment and Invoicing)):</p> <p>Not Permitted</p>

7. LIABILITY AND INSURANCE

7.1	<p>Estimated Call Off Contract Charges:</p> <p>The sum of £120,950 excluding VAT.</p>
7.2	<p>Supplier's limitation of Liability (Clause 37.2.1 of the Call Off Terms);</p>
7.3	<p>Insurance (Clause 38.3 of the Call Off Terms):</p> <p>In accordance with RM6008 MCF2 framework agreement v2, Schedule 14, Annex 1</p>

8. TERMINATION AND EXIT

8.1	<p>Termination on material Default (Clause 42.2 of the Call Off Terms):</p> <p>In Clause 42.2.1(c) of the Call Off Terms</p>
8.2	<p>Termination without cause notice period (Clause 42.7 of the Call Off Terms):</p> <p>In Clause 42.7 of the Call Off Terms as amended at section 2.1.3.1 of the Invitation to Tender (ITT) - Independent Review of Customer Service document</p>
8.3	<p>Undisputed Sums Limit:</p> <p>In Clause 43.1.1 of the Call Off Terms</p>
8.4	<p>Exit Management:</p>

	Not applied
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9. SUPPLIER INFORMATION

9.1	Supplier's inspection of Sites, Customer Property and Customer Assets: Not applied
9.2	Commercially Sensitive Information: Not applied

10. OTHER CALL OFF REQUIREMENTS

10.1	Recitals (in preamble to the Call Off Terms): Recitals B to E Recital C - date of issue of the Statement of Requirements: 28/07/2020 Recital D - date of receipt of Call Off Tender: 17/08/2020
10.2	Call Off Guarantee (Clause 4 of the Call Off Terms): Not required
10.3	Security: In accordance with Call Off Schedule 7 Short Form
10.4	ICT Policy: Not applied
10.6	Business Continuity & Disaster Recovery: Not applied
10.7	NOT USED
10.8	Protection of Customer Data Customer data to be protected in accordance to Clause 35.2 of the Call Off Terms
10.9	Notices (Clause 56.6 of the Call Off Terms): Customer's postal address and email address: Cheylesmore House, Quinton Road Coventry, CV1 2WT Charlotte.BRISCALL@education.gov.uk Supplier's postal address and email address: PA Consulting 10 Bressenden Place London SW1E 5DN ian.matthias@paconsulting.com

10.10	Transparency Reports In Call Off Schedule 13 (Transparency Reports) Not applied
10.11	Alternative and/or Additional Clauses from Call Off Schedule 14 and if required, any Customer alternative pricing mechanism: Not applied
10.13	Publicity and Branding (Clause 36.3.2 of the Call Off Terms) Not applied
10.14	Staff Transfer Annex to Schedule 10, List of Notified Sub-Contractors (Call Off Tender). Not applied
10.15	Processing Data Call Off Schedule 17 Customer Data Protection Officer: Emma Wharram emma.wharram@education.gov.uk 07384 521501 Supplier Data Protection Officer: Ian Matthias ian.matthias@paconsulting.com 07710 239850
Contract Reference:	TBC
Date:	22/09/2020
Description Of Authorised Processing	As per Schedule 17 of the Call Off Terms
Identity of the Controller and Processor	Data Controller is ESFA Data Processor is PA Consulting Services Ltd
Use of Personal Data	Customer Service is procured and managed in siloes across the ESFA resulting in operational and commercial inefficiencies. Customer Service Journeys are designed and delivered in isolation restricting opportunities to a deliver a better and more 'joined up' service for our individual customer groups. Currently teams are too often addressing the same or similar users' needs independently of each

	<p>other. Furthermore, performance indicators are different across a number of areas making it hard to accurately and evaluate, challenge and improve the overall quality and cost of service that we provide.</p> <p>This initiative is to provide external advice by commissioning a short two-three-month review of all existing customer service provision within the ESFA. Receive recommendations based upon industry best practice, performance and cost benchmarks and on whether we should follow a centralised or de-centralised customer service model and inform an organisation design to support the above.</p>	
Duration of the processing	For the duration of the Framework Contract plus 7 years.	
Nature and purposes of the processing	<ul style="list-style-type: none"> Review our existing customer service offerings and evaluate against industry best practice both in public and private sector. Better define, in the context of the work that we do and the groups that we serve, what is excellent customer service and when it is best achieved via voice to voice or digital first routes for example. Provide ESFA with a clearer centralisation versus de-centralisation, in-source versus out-source strategy. Inform a strategy for what customer service should be delivered through which channel and the KPIs that should be used to measure its success. 	
Type of Personal Data	<p>Full name</p> <p>Workplace address</p> <p>Workplace Phone Number</p> <p>Workplace email address</p> <p>Job Title</p>	
Categories of Data Subject	DfE Saff Data	

FORMATION OF CALL OFF CONTRACT

BY SIGNING AND RETURNING THIS CALL OFF ORDER FORM (which may be done by electronic means) the Supplier agrees to enter a Call Off Contract with the Customer to provide the Services in accordance with the terms Call Off Order Form and the Call Off Terms.

The Parties hereby acknowledge and agree that they have read the Call Off Order Form and the Call Off Terms and by signing below agree to be bound by this Call Off Contract.

In accordance with paragraph 7 of Framework Schedule 5 (Call Off Procedure), the Parties hereby acknowledge and agree that this Call Off Contract shall be formed when the Customer acknowledges (which may be done by electronic means) the receipt of the signed copy of the Call Off Order Form from the Supplier within two (2) Working Days from such receipt.

For and on behalf of the Supplier:

Name and Title	Ian Matthias	Member of PA's Management Group
Signature	 Ian Matthias (Sep 23, 2020 13:16 GMT+1)	
Date	Sep 23, 2020	

For and on behalf of the Customer:

Name and Title	Charlotte Briscall	Director of CEDD
Signature	 Charlotte Briscall (Sep 24, 2020 10:40 GMT+1)	
Date	Sep 24, 2020	

Schedule 1 – Services Required

1. DEFINITIONS AND ACRONYMS

Expression or acronym	Meaning
ESFA	Education and Skills Funding Agency
CEDD	Customer experience, Digital and Data Directorate
DfE	Department for Education
GOV.UK	GOV.UK is the website for the UK government. It is the best place to find government services and information. The site is maintained by the Government Digital Service (GDS).

2. THE REQUIREMENT

2.1. We are wanting to procure a short two to three-month review of all existing customer service provision within esfa. A **Lean Canvas** document has been prepared as a summary of the business case to support this procurement and is detailed in **Annex 1**.

2.2. The Supplier is required to:

- 2.2.1.1. Undertake a review of our existing customer service offerings
- 2.2.1.2. Evaluate against industry best practice both in public and private sector
- 2.2.1.3. Make recommendations based on the above on a centralised versus de-centralised, in-source versus out-source strategy
- 2.2.1.4. Make recommendations on an organisation design to support the above
- 2.2.1.5. Inform a strategy for what customer service should be delivered through which channel
- 2.2.1.6. Provide input on the creation of a quality framework for measuring customer service and the KPIs that should be used to measure its success. Metrics are to be applied across all directorates as we are looking for consistency in what is recorded and reported on based on customer feedback. Examples are to include:
 - Customer Sentiment
 - Cost to Serve
 - Outcomes and Key Results
 - User satisfaction – ease of use, timely, reliable, right first time (existing Government indicators)

3. KEY MILESTONES

3.1. The Supplier should note the following project milestones that the authority will measure the quality of delivery against:

Milestone	Description	Timeframe
1	<p>Meet with Charlotte Briscall to scope requirements and agree the specific activities required to undertake the review with</p> <p>Product Deliverable:</p> <p>An agreed schedule of work/work plan</p>	Within week 1 of Contract Award
2	<p>Conduct a short two-month review of all existing customer service provision within the ESFA.</p> <p>Product Deliverable:</p> <p>A written report detailing activity undertaken by the provider to complete the review including dates and names of individuals who have been engaged in the review and records of findings and discussions/interviews conducted as part of the review.</p>	Within week 8 of Contact Award
3	<p>Support in defining customer service and what it is not.</p> <p>Product Deliverable:</p> <p>Written definition of what is meant by customer service within ESFA based on findings from the review and industry best practice.</p>	Within week 8 of Contract Award
4	<p>Following the review make recommendations based upon industry best practice on whether we should follow a centralised or de-centralised customer service model.</p> <p>Product Deliverables:</p> <p>Formal final written report with full analysis and recommendations based on industry best practice on proposed customer service model. Include considerations and rationale for recommendations.</p> <p>Formal meeting and presentation of findings and recommendations to CEDD Director and Senior Team (attendees to be determined)</p>	Within weeks 8 – 12 of Contract Award

	Supporting copy of presentation slides/documentation	
5	<p>A strategy for what customer service should be delivered through which channel and the KPIs that should be used to measure its success</p> <p>Product Deliverables:</p> <p>A formal document proposal (this may be included in the report produced for milestone 3) on the strategy for what customer service should be delivered through which channel including recommendations on the creation of a quality framework for measuring customer service. This is so that metrics are applied across all directorates, consistency in what is recorded and reported on and based on customer feedback.</p> <p>KPIs to measure success to include:</p> <ul style="list-style-type: none"> • Customer Sentiment • Cost to Serve • Outcomes and Key Results • User satisfaction – ease of use, timely, reliable, right first time (existing Government indicators) 	Within weeks 8 – 12 of Contract Award
6	<p>Provide options for consideration on an appropriate organisation design to support the recommendations made on a customer service model.</p> <p>Product Deliverables:</p> <p>A formal written report and supporting diagrams/charts (this may be included in the report produced for milestone 3) to illustrate recommendations on organisation design for an ESFA customer service model.</p>	Within weeks 8 – 12 of Contract Award

4. REPORTING

- 4.1. Included within the Key Milestones table (section 3.1) are the products to be delivered as part of this programme of work. This includes the requirement for written reports and presentations which form the measurable outcomes against the services being commissioned.

5. CONTINUOUS IMPROVEMENT

- 5.1. The supplier will be expected to make any recommendations which will improve the way in which the required Services are to be delivered throughout the contract duration.
- 5.2. Changes to the way in which the services are to be delivered must be brought to the Authority's attention and agreed prior to any changes being implemented.

6. ACCREDITATION

- 6.1. No specific accreditation is deemed appropriate for this procurement, however you **must** have experience of customer service organisation design within at least one large organisation from the private sector.

7. STAFF AND CUSTOMER SERVICE

- 7.1. The provider's staff assigned to the contract shall have the relevant experience of customer service provision to deliver the contract.

8. SERVICE LEVELS AND PERFORMANCE

- 8.1. The Authority will measure the quality of the supplier's delivery by:

Kpi/sla	Service area	Kpi/sla description	Target
1	Scope and approach agreed	An agreed schedule of work/work plan to be agreed with Charlotte Briscall within 1 week of contract award	100%
2	Undertake a formal review of customer services	Undertake the review within weeks 1 - 8 of contract award. The review is expected to combine interviews and engagement with esfa key stakeholders as well as some desk research. It should also include industry best practice from both public and private sector.	100%
3	Documented record of activity undertaken as part of the review	A written report to be submitted at the end of 8 weeks detailing activity undertaken by the provider to complete the review including dates and names of individuals who have been engaged in the review and records of any	100%

		discussions/interviews conducted as part of the review.	
4	Definition of customer service	A written definition of what is meant by customer service within ESFA based on findings from the review and industry best practice. Differentiation from Digital Services, Customer Experience, Communications and Customer Journey.	100%
5	Formal report making recommendations following the review of customer service activity	Formal written report, to be submitted in weeks 8 – 12, making recommendations based on industry best practice on proposed customer service model. Include considerations and rationale for recommendations. Recommendations are to include: <ul style="list-style-type: none"> • a view on a clear centralisation versus de-centralisation, in-source versus out-source strategy • a strategy for what customer service should be delivered through which channel and the KPIs that should be used to measure its success • options for consideration on the appropriate organisation design to support the recommended customer service model 	100%
6	Presentation of recommendations	Formal meeting and presentation of recommendations to CEDD Director and Senior Team (attendees to be determined), delivered between weeks 8 - 12. Provide supporting copy of presentation slides/documentation.	100%

Schedule 2 - Project Plan

Our 10-week hypothesis led diagnostic approach is built around three stages:

Stage 1 – Rapid Initiation – 2 weeks

Stage 2 – Discovery and Insight-Building – 6 weeks

Stage 3 – Develop Solution Options – 2 weeks

Stage 1 – Rapid Initiation

It is critical that the review gets off to a strong start. The main activities we will undertake with you during the 1st stage include:

- Clarify scope and existing information sources, including ESFA's work to date, current metrics in use, and existing customer service propositions
- Confirm and schedule meetings with key stakeholders, including the CEDD leadership team
- Confirm the form and timings of virtual workshops
- Agree key messages / communications to initiate the review
- Review of ESFA existing customer service propositions (provided by CEDD Directorate in their CX Team and National Careers Service). Analyse existing customer insights, to get a clear view of customer journey maps, channel strategy, customer insights analytics , segmentation and tangible external insight
- Agree the schedule of work for the review (Deliverable 1) within week 1

We will also confirm with you a set of core hypotheses (and associated key lines of enquiry) as the basis for structuring the focus of the investigative analysis during Stage 2. Examples of hypotheses include:

- There are options to re-organise the way in which customers engage with ESFA that promote self-service and enable a more efficient and effective operation
- Automaton (e.g. voice and RPA) will help reduce the number of calls and change the types of calls agents have to handle
- There are options to centralise, outsource and / or re-organise activity that can yield a more efficient operation and better outcomes for your customers

Outputs in Stage 1:

- Deliverable 1 – Agreed schedule of work

Stage 2 – Discovery and Insight-Building

The purpose of this stage is to test the reality underpinning the hypotheses agreed in Stage 1, in terms of understanding what drives and influences customer service as it operates today within ESFA, and to bring in external and internal perspectives on what might be feasible for ESFA in looking to a future vision for its offer to its customers. To achieve this, we propose to undertake the following activities:

- Structured, targeted site visits (potentially 'virtual') to a selection of ESFA's customer-facing teams
- Key stakeholder 1-2-1s (including the CEDD leadership team and others to be agreed with you in the first Stage)
- Capability maturity analysis and benchmarking assessment – to cross-reference ESFA current activity and performance levels with comparable examples from our industry experience. Our root-cause analysis tool together with benchmarking will help us rapidly identify the areas of optimisation
- An 'Art of the Possible' workshop, bringing together initial insights and providing an

opportunity for key ESFA stakeholders, operational leads, and decision-makers to come together to explore examples of best practice in customer service innovation, generate 100s of ideas and apply them to your specific customer scenarios. This creates; co-designed future scenarios and a view of the capability changes needed to deliver them, ownership for the future vision and momentum for its delivery – and clarity of what customer service means for you. We have run this workshop for 30+ clients with similar goals and gained excellent client feedback. e.g.

“...significant impact of the AotP kick off workshop... set the tone for the project, engaging the Working Group members really effectively and creating a culture of ambition and collaboration that has influenced the entire delivery, with the clear communication of concepts and insights from that day setting the template for the rest of the work.”

- We will then refine and test our hypothesis, including reviewing the future state design criteria and define design principles and hypotheses of future model e.g.

Centralisation vs de-centralisation

Insource vs Outsource (e.g. capabilities or services)

Remote vs onsite

Tiered service model (e.g. 1st line and 2nd line)

Self-service vs contact centre vs omni-channel

Multi-skilling vs expertise (e.g. alignment to customers or services).

Outputs in Stage 2:

- Deliverable 2 – Review of existing customer service provision in ESFA
- Deliverable 3 – Definition of customer service within ESFA

Stage 3 – Develop Solution Options

In our final Stage, we will bring together the outputs from Stage 2, and will develop in detail the responses to the initial hypotheses outlined and iterated during Stages 1 and 2. We will draw on the specific expertise of our SME panel together with your core stakeholder team and our core project team, to build a collective view on:

- Optimum customer service model, i.e. whether ESFA should pursue a centralised or decentralised model (Deliverable 4)
- Optimum customer channel strategy and associated performance and quality framework, including KPIs (Deliverable 5)
- Options for a target operating model to support the optimum customer service model (Deliverable 6)
- Presentation of our recommendations and findings to the CEDD Director and Senior team (Deliverable 4)

For the customer channel strategy we will decompose the customer scenarios co-designed in the ‘Art of the Possible’ work so we have a view of where users start, how they engage, and how they and we complete the end to end engagement. We will consider other permutations based on these future archetypes to create a universal customer service channel map, with a prediction of volumes and types of content, channels used and the potential channel hand-over points e.g. AI chat to agent chat, voice automation to agent or web channel to agent. The universal customer service channel map together with predicted volumes by channel gives the blueprint from which to we can define and understand the organisational design options including centralised and de-centralised models (or levels of centralisation).

It will also aid creation of the common quality framework and KPIs as we have will have a clear view of how and when we should handle simplex and complex/expert enquiries and the types and volumes expected. We would expect KPIs to include end to end metrics e.g. customer

sentiment and first contact resolution, as well as discrete KPIs for specific channels and types of transaction to encourage migration to lower cost channels where appropriate.

We will create 3-4 options for the future target operating model based on recognised best practice and current customer service trends leveraging key archetypes used elsewhere where clients have highly federated customer service models; each will have a clear SWOT analysis against it together with our recommendation on proposed option.

Outputs in Stage 3:

- Deliverable 4 – Customer Service Model (including presentation of findings and recommendations)
- Deliverable 5 – Channel Strategy and Performance/Quality
- Deliverable 6 - Organisation Design options and routemap for next phase

ANNEX 1

Lean Canvas for Customer Service Rev				
	Designed for:	Designed by:	Date:	Version:
	CEDD	Charlotte Briscall	29/06/20	1.1
<p>Problem</p> <p>1. Customer Service is procured and managed in siloes across the ESFA with resulting in operational and commercial inefficiencies</p> <p>2. Customer Service Journeys are designed and delivered in isolation restricting opportunities for our individual customer groups as teams are addressing the same or similar users' needs independently of each other</p> <p>3. Customer Service Performance indicators are different across departments making it hard to evaluate the overall quality and cost of service that we provide</p>	<p>Solution</p> <p>To review our existing customer service offerings and evaluate against industry best practice both in public and private sector.</p> <p>To have a clear centralisation versus de-centralisation, in-source versus out-source strategy</p> <p>A strategy for what customer service should be delivered through which channel and the KPIs that should be used to measure it's success</p>	<p>Customer Experience Pillars</p> <ol style="list-style-type: none"> To be Helpful and Straightforward Use data to support intelligent decision making Provide accurate and timely payments Broaden Horizons for all people 	<p>Unfair Advantage</p> <p>Our services can't be bought elsewhere how do we measure good customer service.</p> <p>Cost to serve Customer Service journey funnels Conversion rates from query to completion</p> <p>We are not only a provider of services/funding but we are also a regulator which can change the dynamic of the relationship with users/customers.</p>	<p>Customer Segments</p> <p>Learners Providers Employers Citizens Communities</p>
<p>Existing Alternatives</p> <p>ESFA InvestCo. Acts as a central point to review value for money of all customer service investments</p> <p>A customer experience governance board which is attended by all service owners across the ESFA brings together all customer service decisions</p> <p>Customer Experience colleagues attending individual service Boards to inform decisions on Customer Experience</p>	<p>Key Metrics</p> <p>The creation of a quality framework for measuring customer service.</p> <p>Metrics to be applied across all directorates. Consistency in what is recorded and reported on. Based on customer feedback.</p> <ul style="list-style-type: none"> Customer Sentiment Cost to Serve Outcomes and Key Results User satisfaction – ease of use, timely, reliable, right first time (existing Government indicators) 	<p>High-Level Concept</p> <p>A short two month review of all existing customer service provision within the ESFA</p> <p>Recommendations based upon industry best practice on whether we should follow a centralised or de-centralised customer service model</p> <p>An organisation design to support the above</p>	<p>Channels</p> <p>Mobile Web Email Telephony Voice Social Media Face to Face</p>	<p>Early Adopters</p> <ul style="list-style-type: none"> The National Contact Centre T-Levels Service National Careers Service Apprenticeship Service Provider Market Oversight (PMO have 4 objectives for 20/21 one of which is customer focused) Explore how this feeds in to the FE Reform programme.

Independent Review of Customer Service RM6008-MCF2-Call-off-order-form-v5 - Final

Final Audit Report

2020-09-24

Created:	2020-09-22
By:	Jack Millward (Jack.MILLWARD@education.gov.uk)
Status:	Signed
Transaction ID:	CBJCHBCAABAANwSzsc0-c1293keh0GtShVIJB55mcA4d

"Independent Review of Customer Service RM6008-MCF2-Call-off-order-form-v5 - Final" History

-  Document created by Jack Millward (Jack.MILLWARD@education.gov.uk)
2020-09-22 - 2:18:59 PM GMT- IP address: 35.176.86.207
-  Document emailed to Ian Matthias (ian.matthias@paconsulting.com) for signature
2020-09-22 - 2:20:54 PM GMT
-  Email viewed by Ian Matthias (ian.matthias@paconsulting.com)
2020-09-23 - 8:53:40 AM GMT- IP address: 149.12.166.58
-  Document e-signed by Ian Matthias (ian.matthias@paconsulting.com)
Signature Date: 2020-09-23 - 12:16:28 PM GMT - Time Source: server- IP address: 194.75.196.200
-  Document emailed to Charlotte Briscall (charlotte.briscall@education.gov.uk) for signature
2020-09-23 - 12:16:29 PM GMT
-  Email viewed by Charlotte Briscall (charlotte.briscall@education.gov.uk)
2020-09-24 - 9:40:17 AM GMT- IP address: 35.176.86.207
-  Document e-signed by Charlotte Briscall (charlotte.briscall@education.gov.uk)
Signature Date: 2020-09-24 - 9:40:41 AM GMT - Time Source: server- IP address: 35.176.86.207
-  Agreement completed.
2020-09-24 - 9:40:41 AM GMT