Customer Service Commissioner
NEW SOUTH WALES

Quarterly Pulse Check Survey
Q2 2017

Summary Report

June 2017

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Source: Office of Customer Service Commissioner, Quarterly Pulse Check Survey Q2 2017

1. Executive Summary

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1.1 Executive Summary

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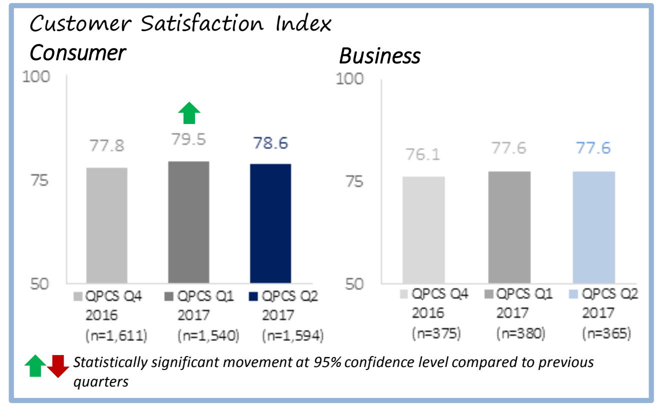
Customer Satisfaction

The Customer Satisfaction Index (CSI) has **decreased for consumers (not statistically significant) and remained stable for businesses** in Q2 2017 when compared to Q1 2017. The Index movements need to be viewed in the context of the time of the year, meaning that longitudinal data may assist with identifying seasonal trends.

- **Among consumers, satisfaction remains stable** across the two quarters (7.6/10) and **satisfaction for businesses has decreased slightly** by 0.1 (7.3/10).

- For both consumers and businesses, **the gap to expectations** is **starting to close compared** to previous quarters. There is an insignificant decrease of 0.1 in expectations for consumer respondents (7.9 in Q1, 7.8 in Q2), and a significant decrease of 0.6 in expectations for business respondents (8.1 in Q1, 7.5 in Q2). Expectations for Q2 for consumer and business respondents appear to be more in line with Q4 2016 QPCS results, with Q1 2017 QPCS results appearing to be an outlier in nature.

- **Gap in ideal service** has experienced a small, significant increase in the gap to an ideal service for consumer respondents (7.2 comparison to ideal score) which has driven the decrease in the CSI. There has been a large increase in the gap to ideal services for business respondents (7.1 comparison to ideal score). For business respondents an increase in the gap to ideal would have translated into a decrease in the CSI, however a decrease in the expectation component of the CSI balanced out this impact, causing the CSI to remain stable. Note: the decrease in expectations for the business respondents only impacted 4% of responses where expectations were previously higher than satisfaction.



Baseline measures (avg. score out of 10):

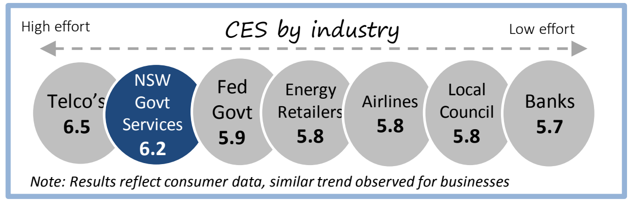
	Consumer			Business		
	Q4 2016	Q1 2017	**Q2 2017**	Q4 2016	Q1 2017	**Q2 2017**
Satisfaction	7.4	↑7.6	**7.6**	7.2	7.4	**7.3**
Expectation	7.8	↑7.9	**7.8**	7.6	↑8.1	**↓7.5**
Ideal service	7.1	↑7.3	**↓7.2**	7.1	7.4	**7.1**

Source: Office of Customer Service Commissioner, Quarterly Pulse Check Survey Q2 2017

1.1 Executive Summary continued

Customer Effort

- Customer Effort Score (CES) **has improved for both consumers and businesses**. This means that customers perceive that they are required to put forward less personal effort when dealing with NSW Government services compared to Q1 2017.
- From a CES benchmarking perspective, both consumers and businesses perceive that direct dealings with **banks, local councils and airlines require less effort** than direct dealings with the NSW Government (both Federal and State).



Insights on Drivers of Satisfaction and Key Primary Opportunity Areas

- Consistent with Q4 2016 and Q1 2017, 'Employees' and 'Goals' related drivers continue to be rated higher than 'Process' and 'Values' related drivers.

- All service attributes that are related to 'the efficiency and effectiveness of employees' have **decreased significantly** in this quarter for consumers. For businesses, all attributes have decreased this quarter with the most significant decreases for the following attributes: 'employees were open and honest during the process', 'employees too initiative and made decisions' and 'I felt there was accountability for services delivered'.

Source: Office of Customer Service Commissioner, Quarterly Pulse Check Survey Q2 2017

2. Background

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2.1 Background

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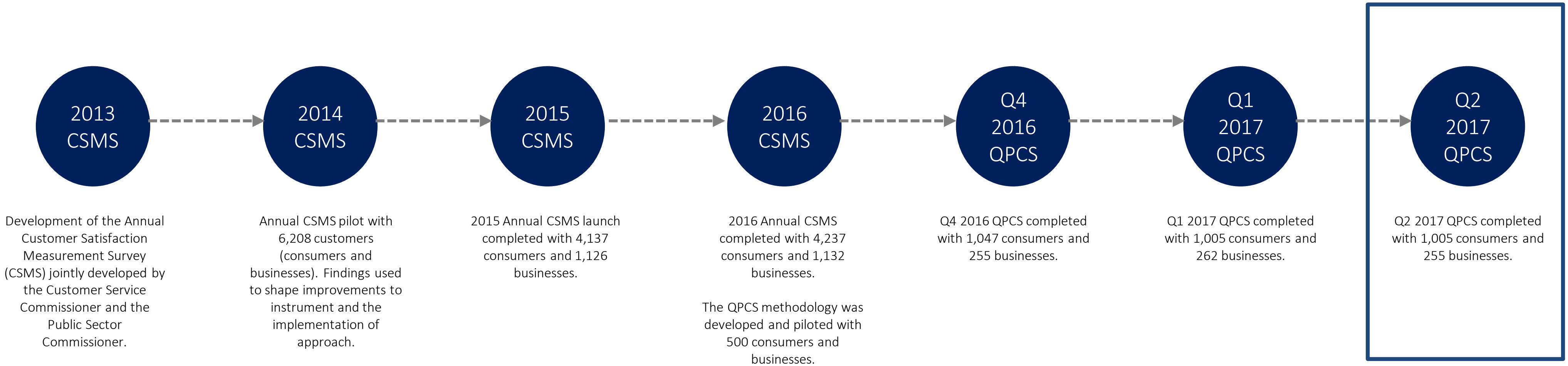
Improving customer satisfaction with key Government services is one of the Premier's Priorities in the NSW State Plan.

The Quarterly Pulse Check Survey was developed in 2016 as part of the broader customer satisfaction program of work, piloted in Q4 2016 and continued into 2017. In conjunction with the Annual Customer Satisfaction Measurement Survey (CSMS), outputs are used to measure progress against the Premier's Priority 12 – 'improve customer satisfaction with key Government services every year, this term of government'.



The results of the Annual CSMS and Quarterly Pulse Check Surveys are also used to complement existing Agency level research programmes and provide important information for Agencies to continue shaping and refining their strategies.

Source: Office of Customer Service Commissioner, Quarterly Pulse Check Survey Q2 2017

2.2 Objectives and Key Outputs

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Project objectives of the Quarterly Pulse Check Survey (QPCS) across key research outputs

Project Objectives:	**Frequency** Provide a more frequent understanding on how New South Wales Government services are performing overall, interpreted in the context of the Premier's Priority 12	+	**Driver Deep Dive** <u>Capture breadth</u>: understand respondents' perceptions across the drivers of satisfaction identified in the Annual CSMS <u>Capture depth</u>: deep dive into specific key primary opportunity areas identified in the Annual CSMS
Research Outputs:	**Customer Satisfaction Index & Baseline Measures** Lead indicator for Premier's Priority 12 - respondents' perceptions of NSW Government services overall, captured by the Customer Satisfaction Index and its composite measures (overall satisfaction, expectation, ideal service)	+	**Deep Dive into Driver Performance** <u>Breadth</u>: more frequent understanding of the 8 drivers of satisfaction. <u>Depth</u>: deeper understanding of key primary opportunity areas captured in the Annual CSMS (efficiency and effectiveness of employees, access to information and simplicity and efficiency of processes)
	Fixed section		*Fixed + rotating variable section*

Source: Office of Customer Service Commissioner, Quarterly Pulse Check Survey Q2 2017

2.3 Research Scope and Approach

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- The QPCS Methodology is aligned to the Annual Customer Satisfaction Measurement Survey (CSMS) approach:
  - Captures feedback across 22 different NSW Government services (described in the customer's language).
  - Feedback received from customers about each of the individual services is aggregated to provide a view of the performance of NSW Government services overall.
  - Each respondent provides feedback regarding 1 or 2 services (as a result, the total number of responses received across services is greater than the total number of customers who completed the survey).
- The survey was completed from 27th April 2017 to 4th May 2017 and results are therefore reflective of experiences with services over the six months prior, from November 2016 and April 2017. This is consistent with Q1 2017 QPCS and Q4 2016 QPCS which were also completed over six working days.
- The Q2 2017 QPCS was completed with:
  - N = 1,005 consumers, and
  - N = 255 businesses.
- As each respondent provides feedback regarding 1 or 2 services, the Q2 2017 QPCS number of responses:
  - N = 1,564 for consumers, and
  - N = 365 for businesses.
- All scores reported in this document are out of 10, with the exception of the Customer Satisfaction Index which is out of 100.

In scope services:

Industry
- Agriculture Advice and Funding Services
- Business Advisory Services
- Water Supply
- TAFE Services

Justice
- Police
- State Emergency Services
- Prisons
- Courts
- Fire Brigades
- Art Galleries and Museums

Family & Community Services
- Public Housing
- Disability Services
- Child Protection Services
- Services for Older People

Transport
- Public Transport
- Car and Boat Registration
- Major Roads

Health
- Public Hospitals
- Ambulance Services

Education
- Public Schools

Finance, Services & Innovation
- Consumer Affairs (Fair Trading)

Planning & Environment
- Environment and Wildlife Protection

Multiple clusters
- Documentation Services (including certificates for births deaths and marriages; trade licenses and certificates; and drivers licenses)

Source: Office of Customer Service Commissioner, Quarterly Pulse Check Survey Q2 2017

2.4 Linkage Between the Annual CSMS and QPCS

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The table below provides an overview of the differences between the QPCS Q4 2016, Q1 2017 and Q2 2017; 2016 CSMS has been provided for context:

Key Features	2016 Annual CSMS	Q4 2016 QPCS	Q1 2017 QPCS	Q2 2017 QPCS
Qualifying Criteria and Measurement Period	• Direct dealings with NSW public services within last 12 months • 2016 CSMS results are reflective of experiences with services between May 2015 and May 2016	• Direct dealings with NSW public services within last 6 months • Q4 2016 QPCS results are reflective of experiences with services between April 2016 and October 2016.	• Direct dealings with NSW public services within last 6 months • Q1 2017 QPCS results are reflective of experiences with services between August 2016 and February 2017.	• Direct dealings with NSW public services within last 6 months • Q2 2017 QPCS results are reflective of experiences with services between November 2016 and April 2017.
Customer Satisfaction Index	• All measure expectations, satisfaction and comparison with ideal service	• All measure expectations, satisfaction and comparison with ideal service		
Perceptions of Services & Satisfaction Drivers	• Measures perceptions of attributes • Drivers of satisfaction are derived from measurement at an attribute level for all drivers	• Measures perceptions of satisfaction drivers (asked directly) • Drivers of satisfaction as identified by the CSMS		
Sample Size	• Consumer n=4,237; Business n=1,132	• Consumer n=1,047; Business n=255	• Consumer n=1,005; Business n=262	• Consumer n=1,005; Business n=255
Margin of Error for Customer Satisfaction Index (95% Confidence Interval)	• Consumer is ± 0.4 • Business is ± 0.8	• Consumer is ± 1.0 • Business is ± 2.3	• Consumer is ± 1.2 • Business is ± 2.8	• Consumer is ± 1.2 • Business is ± 2.5
Recency of Experience	**Consumers:** • 0-3 months: 57% • 3-6 months: 22% • 6-12 months: 21% **Businesses:** • 0-3 months: 50% • 3-6 months: 25% • 6-12 months: 25%	**Consumers:** • 0-3 months: 63% • 3-6 months: 37% **Businesses:** • 0-3 months: 66% • 3-6 months: 34%	**Consumers:** • 0-3 months: 65% • 3-6 months: 35% **Businesses:** • 0-3 months: 63% • 3-6 months: 37%	**Consumers:** • 0-3 months: 63% • 3-6 months: 37% **Businesses:** • 0-3 months: 61% • 3-6 months: 39%

Source: Office of Customer Service Commissioner, Quarterly Pulse Check Survey Q2 2017

2.5 Focus Group Methodology

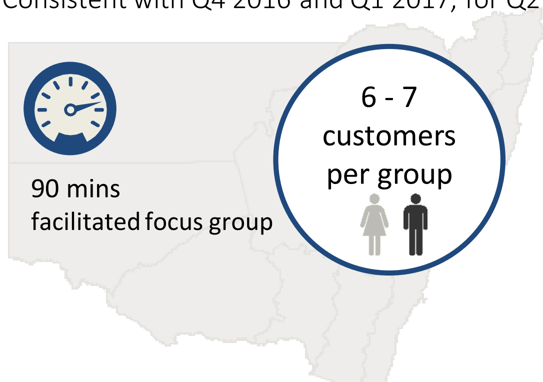
The primary objective of the QPCS online survey is to capture feedback on satisfaction and information on the drivers of satisfaction on a more regular basis. Qualitative research, conducted through focus groups, allows for the results of the online survey to be further understood and to provide additional context around the insights.

Qualitative Research Objectives

Understand what is driving changes in expectation for businesses and the relationship between expectation and satisfaction	+	Identify opportunities that could enhance overall satisfaction and future service delivery for both consumers and businesses

QPCS Q2 2017 Focus Groups

Consistent with Q4 2016 and Q1 2017, for Q2 2017 three focus groups were held across two different geographical regions:



- Two consumer groups (Sydney CBD and Parramatta) and one business group (Sydney CBD) were held between 31st May-2nd June, 2017
- The focus groups comprised people who had direct dealings with NSW Government services in the last 6 months
- Respondents were selected to provide a mix of ages, genders, geographical locations and experiences

Findings and quotes from the qualitative research have been integrated throughout the report to support and supplement analysis.

Findings are indicated using this symbol:

Quotes are indicated using this symbol:

Detailed findings can be found in Appendix B.

Source: Office of Customer Service Commissioner, Quarterly Pulse Check Survey Q2 2017

3. Considerations for QPCS Interpretation

Section Contents

3.1 Key Considerations for Interpreting QPCS Insights

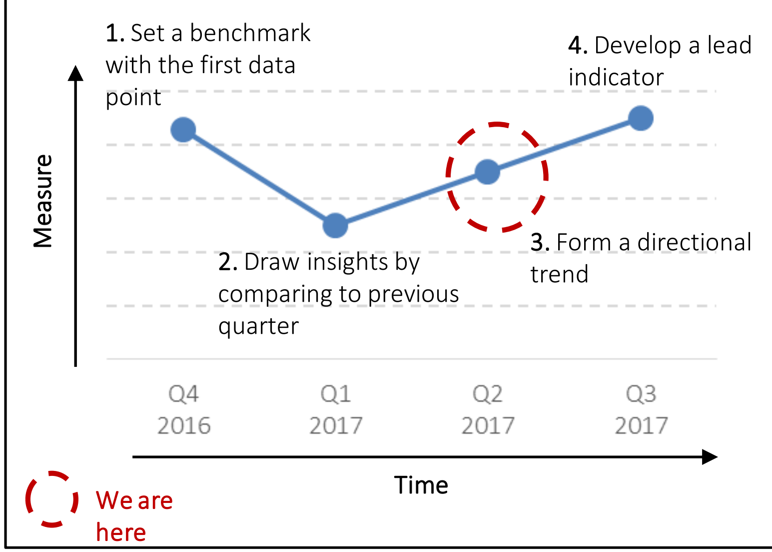
General Considerations:

- The QPCS results do not replace the Annual CSMS results, but rather provide a directional indication of the shift in the results.
- Although the QPCS sample characteristics are closely representative of the NSW population, different customers have been surveyed and as such the results are directional indicators of shifts in the Annual CSMS results only.
- The margin of error (MoE) for the QPCS needs to be considered when interpreting the results *(see slide 16 for further detail on MoE differences)*.

Considerations for interpreting the QPCS data points:

- The QPCS results need to be interpreted in the context of the time of the year and in light of events in order to normalise seasonal trends in the data. Therefore, overall caution should be taken when interpreting the QPCS findings until a minimum of a full year of results has been collected, so that any seasonal impacts can be examined and adjusted accordingly.
- In the following slides, the results of Q2 2017 QPCS have been compared to the results of Q1 2017 QPCS and Q4 2016 QPCS. Significance testing is based on the comparison to Q1 2017 results at 95% confidence level, which was the recommended and endorsed approach for trend analysis as part of the QPCS Methodology Report.
- The Annual CSMS results have been provided as additional context for the QPCS data point and should not be used as a comparison to QPCS results.
- A longitudinal dataset will need to be built over time in order to identify 'real' trends in the QPCS results and to strengthen the reliability and validity of any conclusions drawn.

Interpretation Plan for Tracking Study



Key used throughout the report:

- Q4 2016 - Consumer
- Q1 2017 - Consumer
- Q2 2017 - Consumer
- Q4 2016 - Business
- Q1 2017 - Business
- Q2 2017 - Business

Source: Office of Customer Service Commissioner, Quarterly Pulse Check Survey Q2 2017

3.1 Key Considerations for Interpreting QPCS Insights continued

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Insights for Annual CSMS:

- The last three QPCS results have been reviewed to identify consistent trends that could provide insight into the upcoming Annual CSMS 2017 results.
- Q2 2017 results are closely aligned with both the Q4 2016 results and the Annual CSMS 2016 results. This suggests that the Q1 2017 results are an outlier in nature. Taking this into consideration the CSI measure has been stable. There are some small directional movements that could provide some indication of Annual CSMS 2017 results:
    - For consumers, given that the results have been consistent (with the exception of Q1 2017) there is an indication that the Annual CSMS 2017 results may be consistent with the Annual CSMS 2016 result.
    - For businesses, the CSI score has decreased from 78.4 in the Annual CSMS 2016 to 76.1 in Q4 2016. The CSI score then increased to 77.6 in Q1 2017 and remained stable at 77.6 in Q2 2017. This suggests that the CSI score in the Annual CSMS 2017 will remain consistent with these quarterly scores, and may be lower than the Annual CSMS 2016 result.

Source: Office of Customer Service Commissioner, Quarterly Pulse Check Survey Q2 2017

4. Customer Satisfaction Measures

Section Contents

4.1 Customer Satisfaction Index

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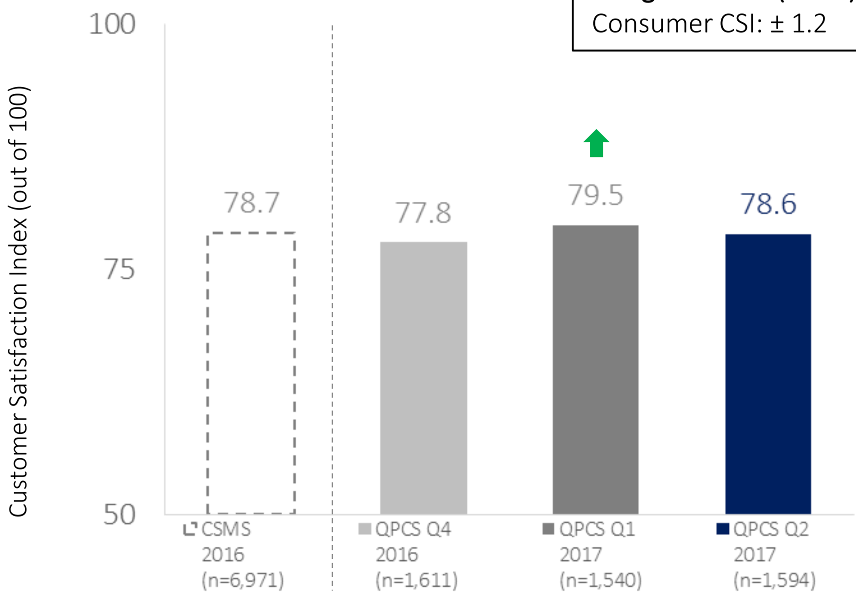
Consumer – Customer Satisfaction Index

The Customer Satisfaction Index (CSI) as measured by the QPCS in Q2 2017 is 78.6 for consumers.

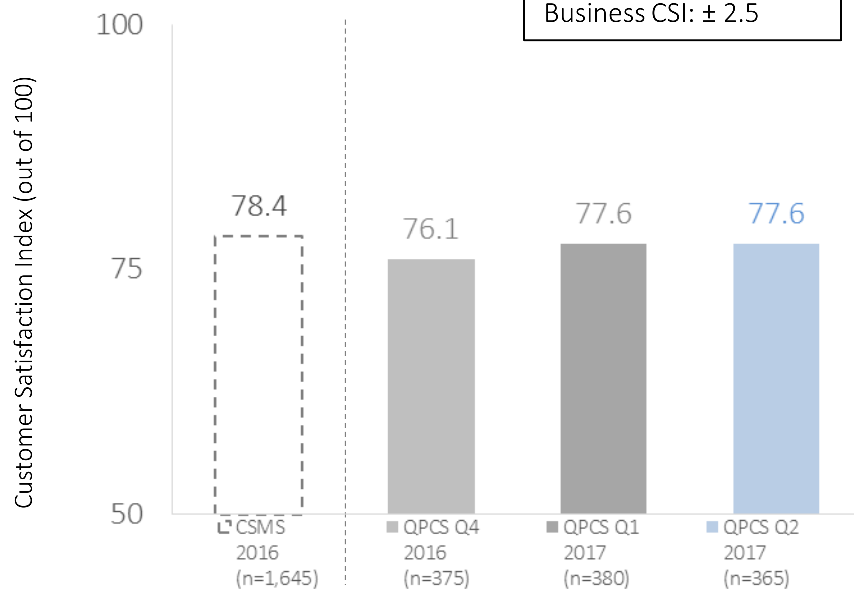
Margin of Error (QPCS)
Consumer CSI: ± 1.2



Business – Customer Satisfaction Index

The Customer Satisfaction Index (CSI) as measured by the QPCS in Q2 2017 is 77.6 for businesses.

Margin of Error (QPCS)
Business CSI: ± 2.5



Statistically significant movement at 95% confidence level compared to previous quarters results

The Customer Satisfaction Index decreased for consumers and remained the same for businesses in Q2 2017 compared to Q1 in 2017. The decrease for consumers is not statistically significant. The Index movements need to be viewed in the context of the time of year and more longitudinal data would assist with identifying seasonal trends.

Source: Office of Customer Service Commissioner, Quarterly Pulse Check Survey Q2 2017

4.2 Top Line Performance – Satisfaction, Expectation and Comparison to Ideal

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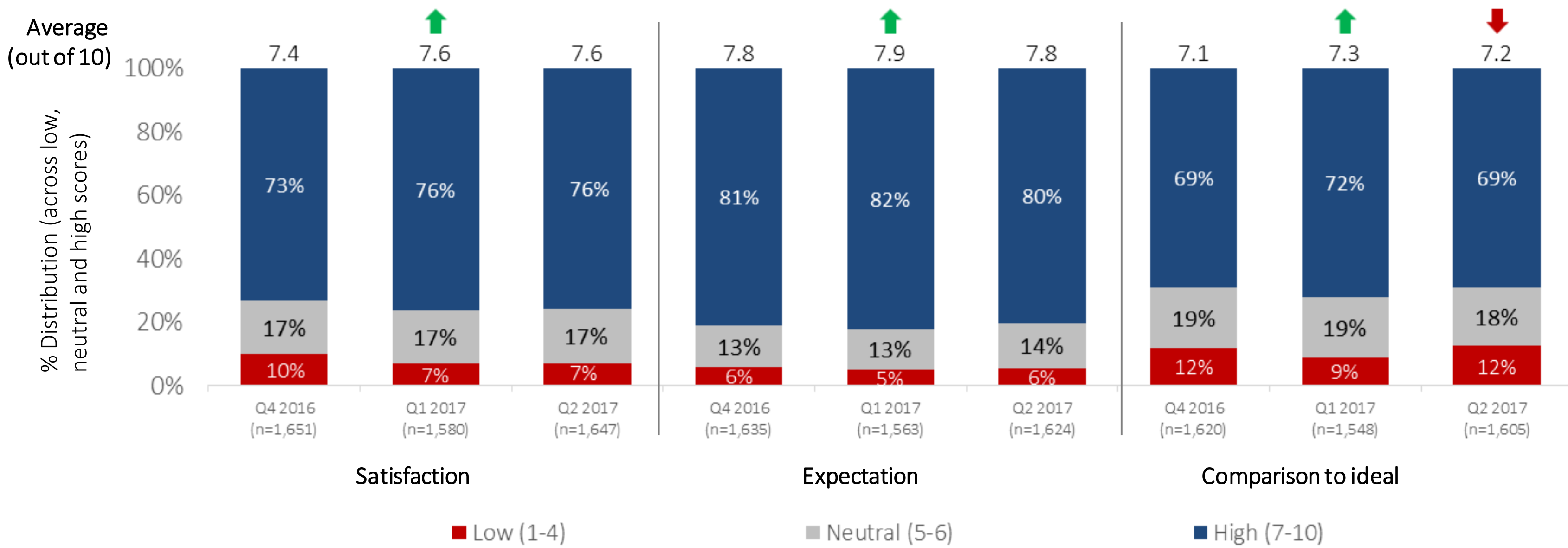
Consumer – Outcome Measures

Average satisfaction as measured by the QPCS in Q2 2017 for consumers is 7.6, which is below average expectation of 7.8. When compared to an 'ideal' service, consumers rated NSW Government services on average 7.2 out of 10.



Statistically significant movement at 95% confidence level compared to previous quarters results

For consumers, the satisfaction score remains stable. There has been a small significant increase in the gap to ideal service and a small significant decrease in the expectation scores. The expectation scores for consumers are more in line with Q4 2016 results, but vary from Q1 2017 results slightly (Q1 being an outlier).

Source: Office of Customer Service Commissioner, Quarterly Pulse Check Survey Q2 2017

4.2 Top Line Performance – Satisfaction, Expectation and Comparison to Ideal

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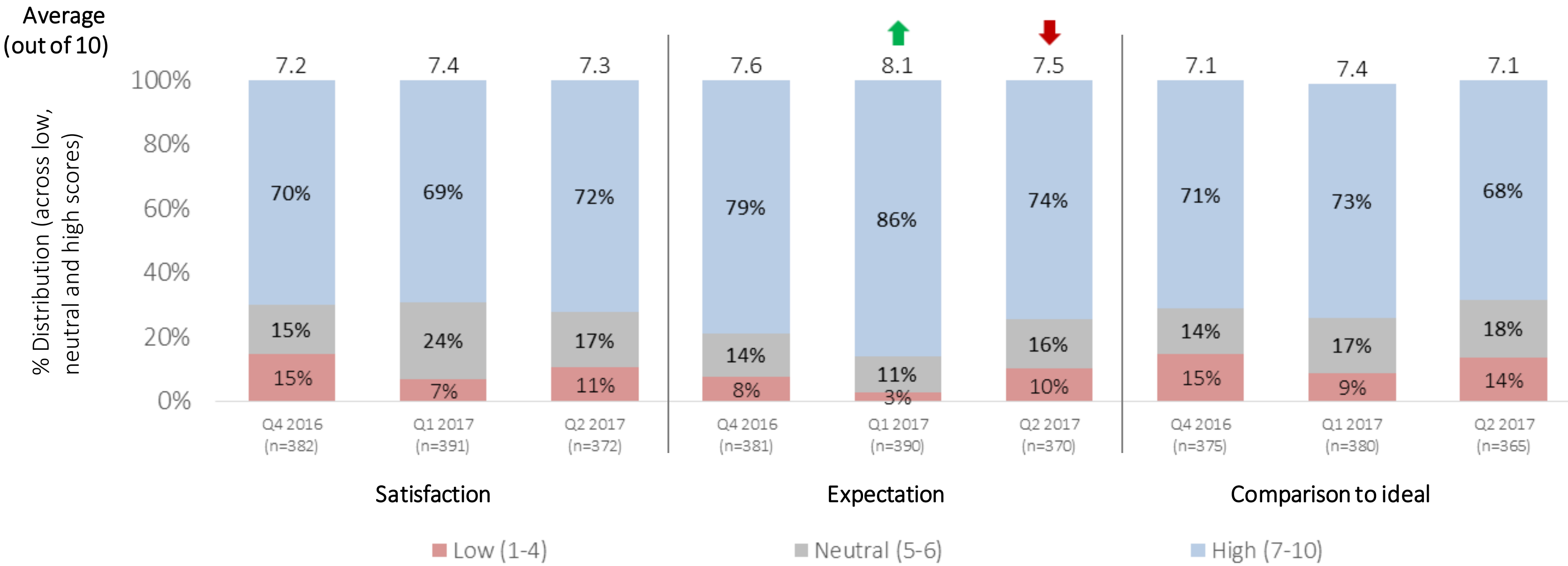
Business – Outcome Measures

Average satisfaction as measured by the QPCS in Q2 2017 for businesses is 7.3, which is below average expectation of 7.5. When compared to an 'ideal' service, businesses rated NSW Government services on average 7.1 out of 10.



Statistically significant movement at 95% confidence level compared to previous quarters results

Business participants agreed that expectations across the business community of the level of service they received should be high. However, as a result of past experiences, expectation was typically lower. Qualitative research suggests negative interactions with one service impacted expectations of other services.

Expectation of businesses has significantly decreased in Q2 2017. Expectation scores for businesses appear to be more in line with Q4 2016 QPCS results, with Q1 2017 QPCS results appearing to be an outlier in nature. The gap to expectations (i.e. satisfaction and expectation) is starting to close compared to previous quarters.

Source: Office of Customer Service Commissioner, Quarterly Pulse Check Survey Q2 2017

4.3 Customer Effort Score and Impacts on Customer Satisfaction

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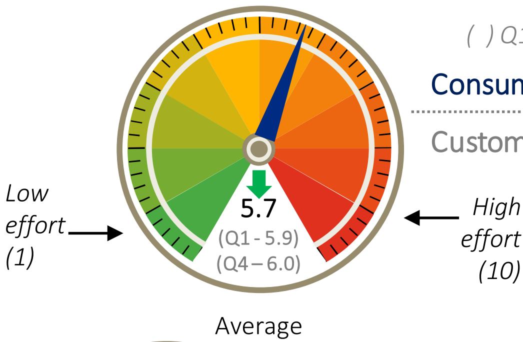
Average Customer Effort Score

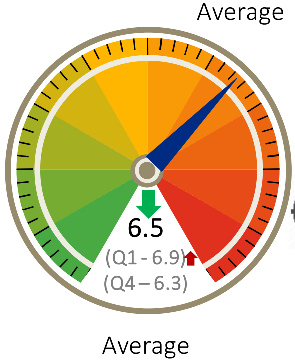
Q2 2017 QPCS Result
( ) Q1 2017 and Q4 2016 QPCS Result



Consumer (n=1,590)

Customer Effort Score

Consumers identified there was a higher level of effort in circumstance where they found it difficult to navigate service websites to find the right information

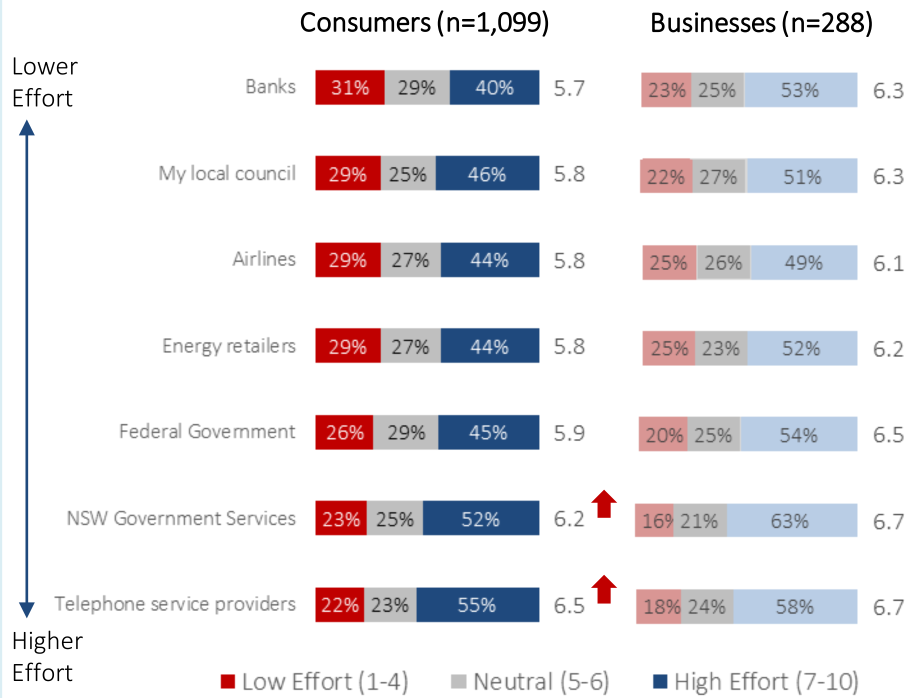


Business (n=366)

Customer Effort Score

Amongst businesses, the level of effort was related to the level of dissatisfaction they felt. The more effort something took to resolve, the more dissatisfied they were.

Customer Effort Score Benchmark



Statistically significant movement at 95% confidence level compared to previous quarters results

Customer Effort is asked at a Whole of Government level and not the aggregation of service results.

Low effort dealings were identified as efficient, not time consuming and can be completed online. High effort dealings were typically identified as being administrative and where problems were not resolved quickly. Services that are critical to the public were categorised as low effort (e.g. emergency services and transportation)

The customer effort score (CES) has improved for both consumers and businesses with customers identifying less effort is required to be put forward when dealing with NSW Government services overall compared to Q1 2016. For businesses, the CES has decreased from 6.9 in to 6.5 and for consumers the CES has decreased from 6.9 to 5.7 since Q1 2017. From a benchmarking perspective, both consumers and businesses perceive that they require less effort to deal with banks, local councils and airlines than Government (both Federal and NSW) in general.

Source: Office of Customer Service Commissioner, Quarterly Pulse Check Survey Q2 2017

5. Insights on Satisfaction Drivers

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Consumer Business

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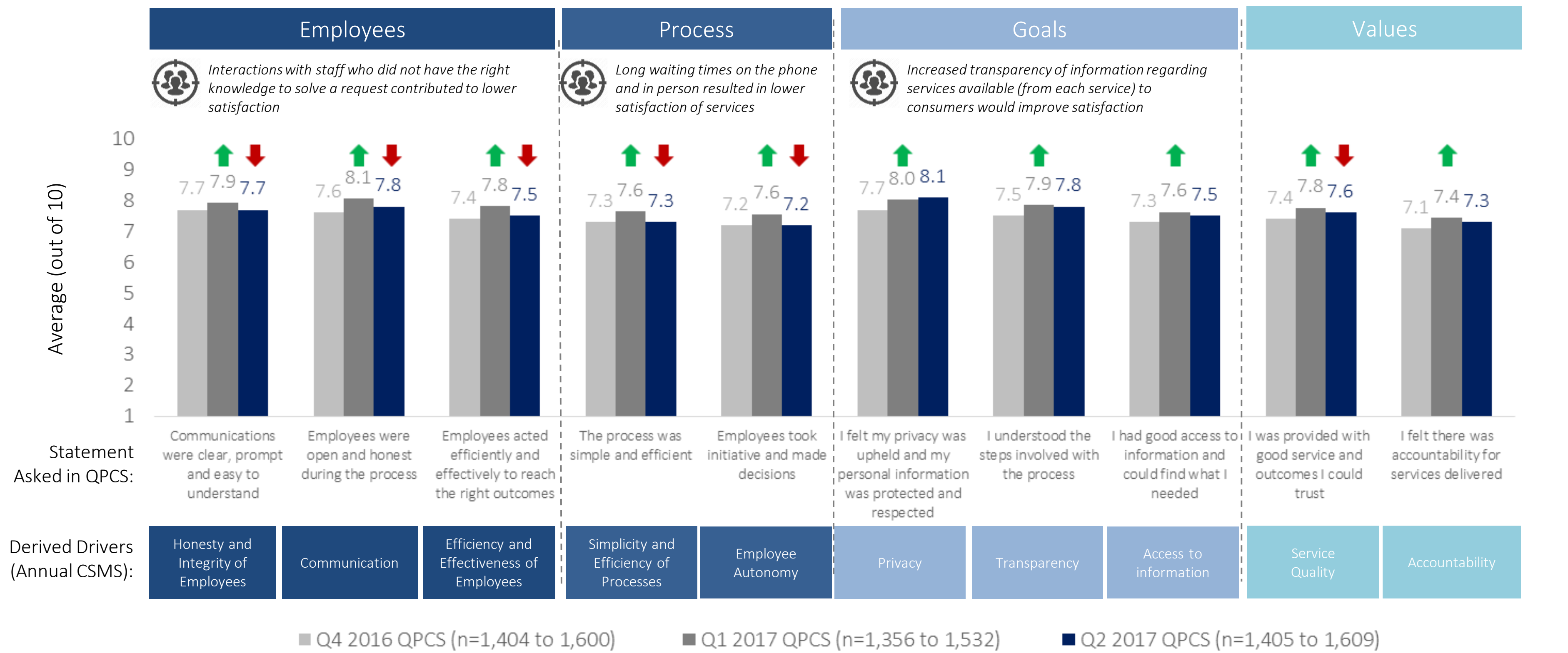
5.1 Performance of Satisfaction Drivers - Consumers

Drivers of Satisfaction



Statistically significant movement at 95% confidence level compared to Q1 2017 results

Among consumers, the performance of satisfaction drivers have decreased compared to Q1 2017, with the exception of 'I felt my privacy was upheld and my personal information was protected and respected' which experienced a slight increase of 0.1 (insignificant). Consistent to Q1 2017 and Q4 2016, 'Employees' and 'Goals' related drivers have been rated higher than 'Process' and 'Values' related drivers.

Source: Office of Customer Service Commissioner, Quarterly Pulse Check Survey Q2 2017

5.1 Performance of Satisfaction Drivers - Consumers

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Drivers of Satisfaction

Lowest ranked service (based on overall satisfaction across services interacted with in the past 6 months)

Case by Case Treatment

"Treat each case, case by case and be flexible in order to respond to priority cases first"

"Being more lenient on circumstances"

"Providing more options for how I want to interact with the service"

"When receiving a response for my case, not receiving a standard response letter"

Timely information

"Real-time information through integrated systems"

"Up to the minute website information"

"Correct information upfront"

Reduced waiting times

"The waiting time should be reduced"

"Timely service and lower waiting periods"

Highest ranked service (based on overall satisfaction across services interacted with in the past 6 months)

Ownership and accountability

"How my case is handled. Who is the officer? How it is progressing, the status and that we can see it online. Dominos show us this with pizza orders, why can't we see it with our case or query?"

"Upon enquiring, if they could generate a number so next time I can directly get an update with that number or know who to contact"

Timely information

"Timely communication of transport services (new services, scheduled changes and interruptions to my services) through SMS"

"Integrated portal with the information I need to complete the task required. When renewing my car registration online, I need my insurance information in real-time"

Other

"Lower costs"

"Perhaps more face to face contact"

"Better training of staff and reduce the number of forms"

**Note: These quotes were collected during the qualitative research*

Source: Office of Customer Service Commissioner, Quarterly Pulse Check Survey Q2 2017

5.2 Performance of Satisfaction Drivers - Businesses

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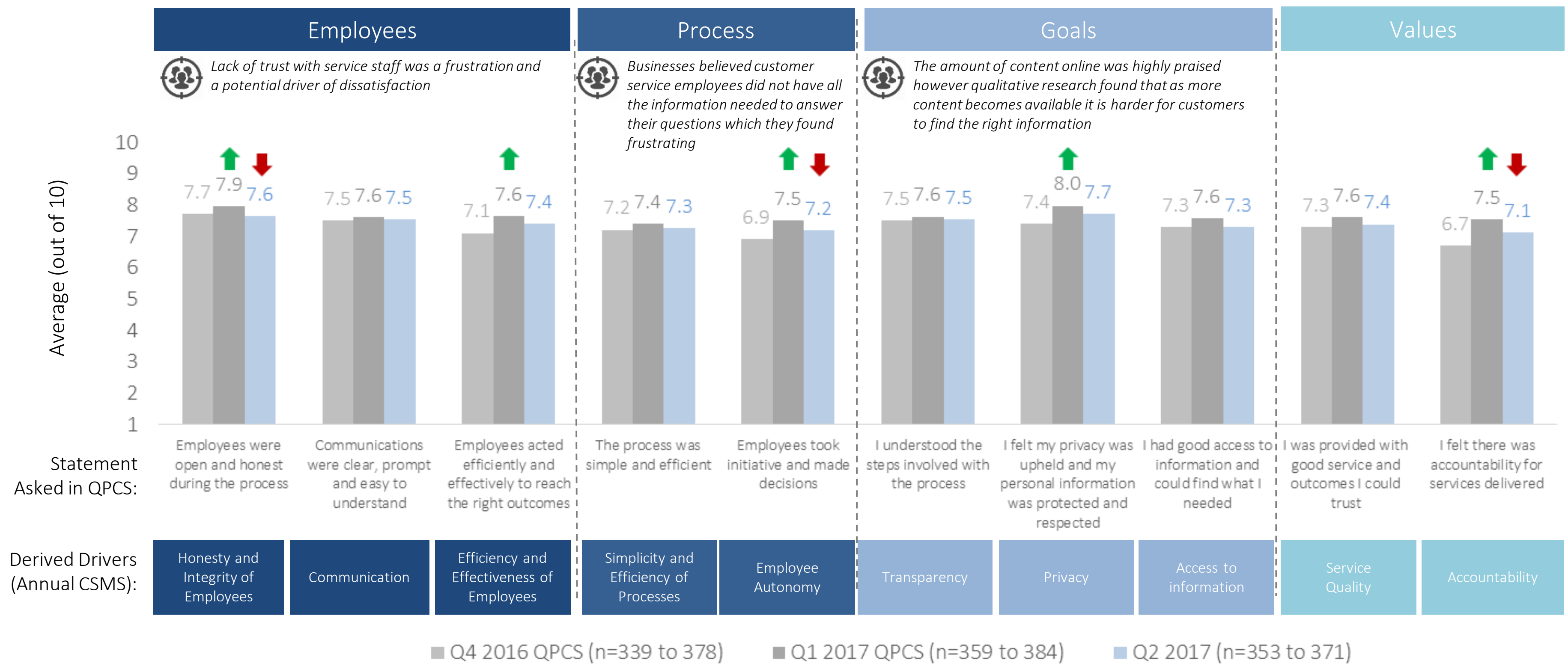
Drivers of Satisfaction



Statistically significant movement at 95% confidence level compared to Q1 2017 results

Among businesses, the performance of satisfaction drivers have decreased compared to Q1 2017, with the most significant decrease for 'I felt there was accountability for the services delivered' (decreasing by 0.4).

Source: Office of Customer Service Commissioner, Quarterly Pulse Check Survey Q2 2017

5.1 Performance of Satisfaction Drivers - Businesses

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Drivers of Satisfaction

What was your biggest area of dissatisfaction with the service you ranked the lowest (based on overall satisfaction across the services you interacted with the past 6 months)

Expectation of overall quality of service

"I expected more attention as a small business. I didn't feel valued or recognised"

"I expected more. I was pointed in the direction of broad information"

"It wouldn't take a lot to make me satisfied as my expectation is low. Instead it would be just getting the basics right"

Accessible information

"Improve the depth of knowledge of service staff. When I get a good one, I feel like I need to keep them on the phone to answer all of my questions"

"Not being able to get to information quickly and reliably"

More efficient processes

"Make the process more efficient"

"The amount of stakeholders we have to deal with"

What is the one thing that if changed would increase your satisfaction?

More efficient processes

"Reduce the time involved, you have to wait around a lot"

"Making information sheets clearer with less ambiguous information"

Accessible information

"Understanding what it is that is available to me from a service"

"Better information and resources"

"Staff who are really knowledgeable"

Customer focused staff

"Understand what we do, we don't fit into one business model"

"More support during the initial contact"

"Polite staff"

"Would be good to have case officers who have a customer focus. There is a big difference and you really know when people have that edge [customer understanding]"

**Note: These quotes were collected during the qualitative research*

Source: Office of Customer Service Commissioner, Quarterly Pulse Check Survey Q2 2017

6. Insights on Key Primary Opportunity Areas

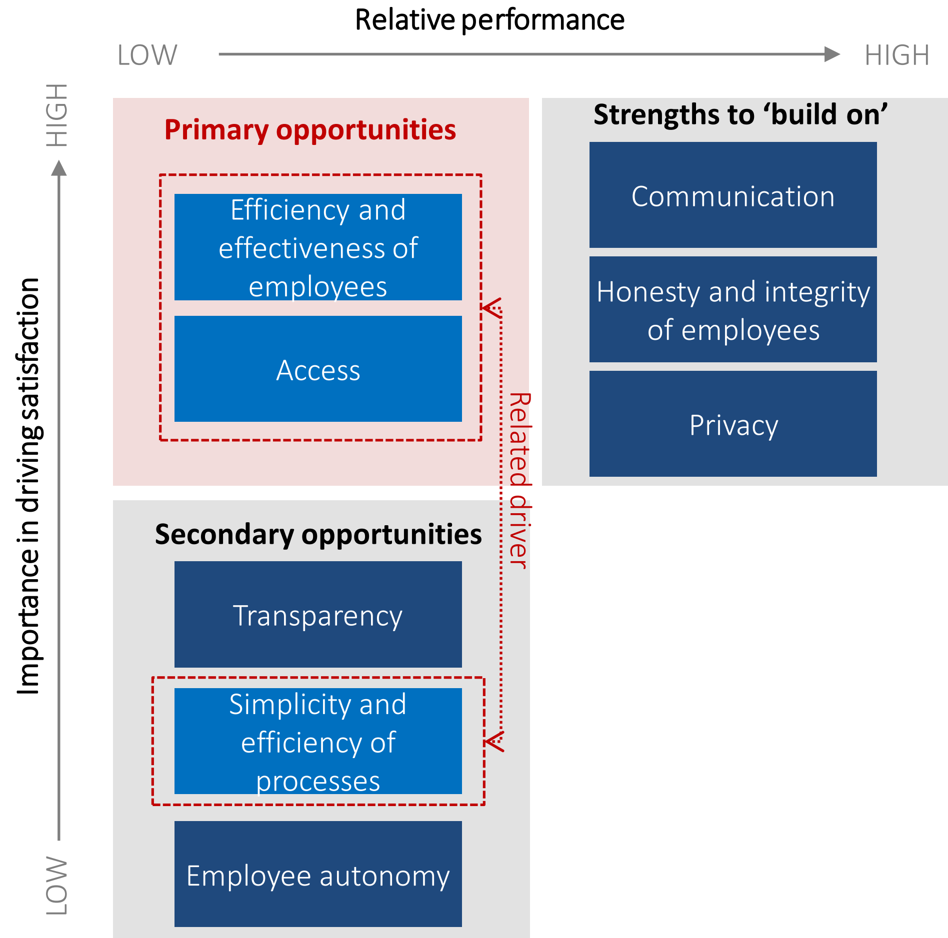
Section Contents

6.1 Introduction to Key Primary Opportunity Areas

Key Primary Opportunity Areas were identified based on 2016 Annual CSMS data and are not from the QPCS results. These were derived based on analysis of the importance of drivers in determining satisfaction and their performance. Key Primary Opportunity Areas have been tested further in the QPCS with new attributes included to inform inclusions in the next Annual CSMS.

The Key Primary Opportunity Areas reveal:

- **Efficiency and effectiveness of employees** and **access to information and online services** are primary opportunity drivers for increasing satisfaction as they are of high importance in driving customer satisfaction and their perceived performance is lower
- **Simplicity and efficiency of processes** is a related opportunity for improvement as the perceived performance today is lower and satisfaction with this driver is strongly related to efficiency and effectiveness of employees, and access



Source: Office of Customer Service Commissioner, Quarterly Pulse Check Survey Q2 2017

6.2 Performance of Key Primary Opportunity Areas - Consumers

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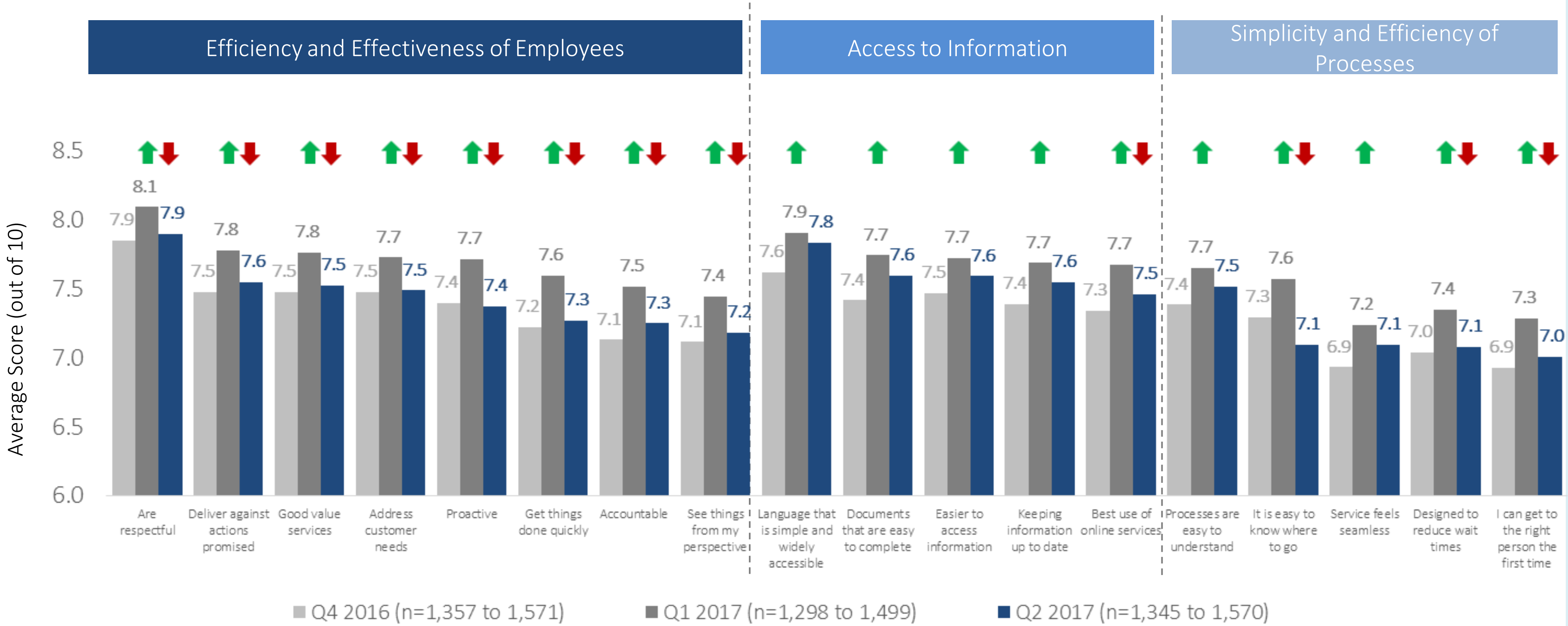
Consumer - Key Primary Opportunity Areas



Statistically significant movement at 95% confidence level compared to previous quarters results

All attributes relating to the efficiency and effectiveness of employees have significantly decreased this quarter, with the largest significant decrease for ‘are proactive in helping’ and ‘get things done as quickly as possible’. Some of the process related attributes remain the lowest scoring such as ‘I can get to the right person the first time’, ‘service feels seamless’ and ‘designed to reduce wait times’, which is consistent with Q4 2016 and Q1 2017.

Source: Office of Customer Service Commissioner, Quarterly Pulse Check Survey Q2 2017

Consumer Business

6.3 Contributors to Driving Satisfaction and Areas for Improvement - Consumers

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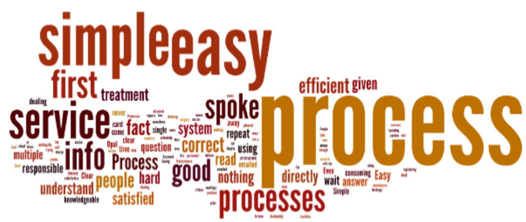
Contributors to Satisfaction

Statement – "Employees acted efficiently and effectively to reach the right outcomes (e.g. Didn't waste time and got it right the first time)"

Statement – "I had good access to information and could find what I needed"

Statement – "The process was simple and efficient (i.e. no unnecessary steps or repetition)"



Improvement Areas

Lowest rating attribute- "I can get to the right person the first time"

> *If I was sent to the right person and no repetitive steps were involved*
> *- Consumer*

> *If I need to contact the service by phone I am able to speak to the person desired without having to state my inquiry to more than one person*
> *- Consumer*

2nd lowest Rating Attribute – "Processes are designed to reduce wait tines"

> *If the steps to be taken were clear and nothing had to be repeated*
> *- Consumer*

3rd lowest rating attribute – "Service feels seamless even if I have to communicate across different channels (i.e. online, phone, email)"

> *There seems to be no relation between what is on the web and what is said by individual officers*
> *- Consumer*

These insights are used to provide greater richness to interpreting the quantitative data.

**Note: Quotes were collected in the online survey*

Source: Office of Customer Service Commissioner, Quarterly Pulse Check Survey Q2 2017

6.4 Performance of Key Primary Opportunity Areas - Businesses

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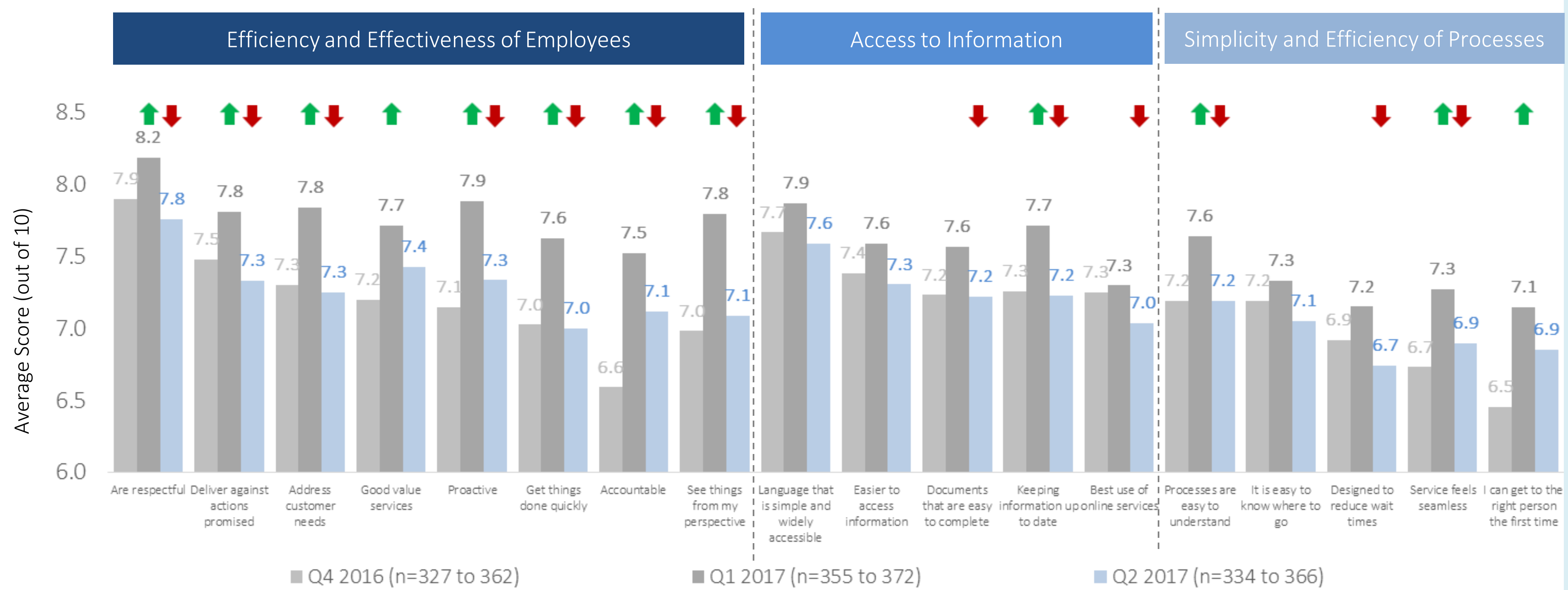
Business - Key Primary Opportunity Areas



Statistically significant movement at 95% confidence level compared to previous quarters results

For businesses, all attributes have decreased this quarter, with the most significant decreases for attributes within Efficiency and Effectiveness of Employees. Similar to consumers, process related attributes remain lower rated overall which is consistent to Q4 2016 and Q1 2017.

Source: Office of Customer Service Commissioner, Quarterly Pulse Check Survey Q2 2017

6.5 Contributors to Driving Satisfaction and Areas for Improvement - Businesses

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Contributors to Satisfaction

Statement – "Employees acted efficiently and effectively to reach the right outcomes (e.g. Didn't waste time and got it right the first time)"

Statement – "I had good access to information and could find what I needed"

Statement – "The process was simple and efficient (i.e. no unnecessary steps or repetition)"

Improvement Areas

Lowest rating attribute- "Processes are designed to reduce wait times"

> "I hate being passed around from one person to another – it wastes my time and shows disrespect to the customer. A simple and efficient process will always impress me"
> *- Business*

2nd lowest Rating Attribute – "Service feels seamless even if I have to communicate across different channels (i.e. online, phone, email)"

> "The initial process was not explained over the phone when making the initial booking. It would have been a lot less intimidating and confronting if this was conveyed in advance. There is no information on the correctional services website either."
> *- Business*

3rd lowest rating attribute – "I can get to the right person the first time"

> "One employee following my issue through, not passing it around for someone else to deal with"
> *- Business*

> "If the customer service officer dealt with the query so I didn't have to deal with multiple people"
> *- Business*

These insights are used to provide greater richness to interpreting the quantitative data.

**Note: Quotes were collected in the online survey*

Source: Office of Customer Service Commissioner, Quarterly Pulse Check Survey Q2 2017

7. Channel Usage and Preference

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7.1 Channel Usage

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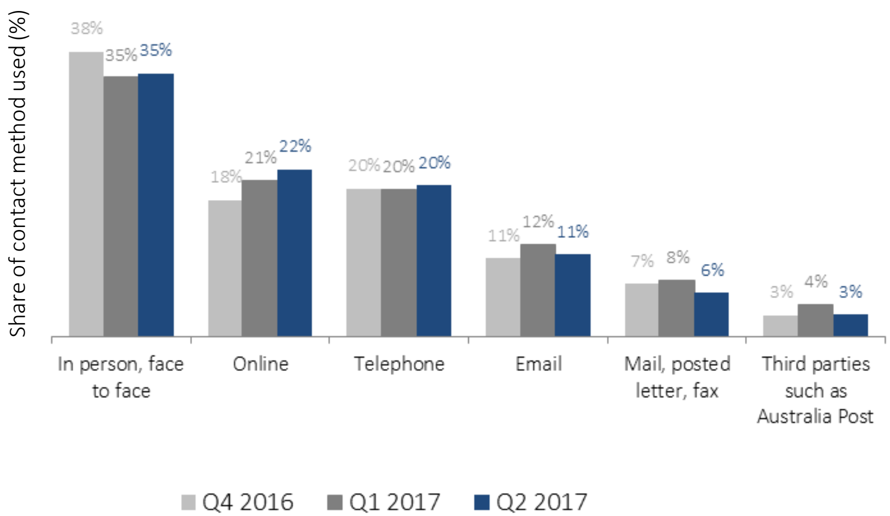
Contact Methods Used

Consumer

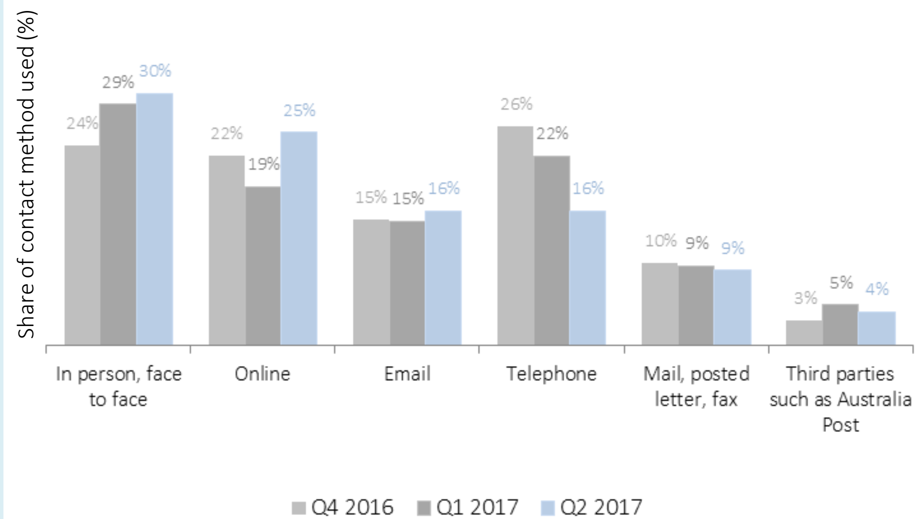
Consumers were satisfied with face to face interactions where wait times and processing requests were efficient and consistent across multiple experiences with a service



Consumer n=1,647

Business

Qualitative research found that businesses were very satisfied with the amount of content available when using online services. However, as more information becomes available businesses found it more difficult to locate information



Business n=372

For consumers, channel usage remains reasonably stable over the quarter. Face-to-face is still the most commonly used channel, followed by online and telephone. For businesses, consistent to Q1 2017, face-to-face remains the most commonly used channel followed by telephone and online.

**Note: Contact methods used is a multi response question*
**Channel usage has been rebased on total number of responses for comparison to channel preference.*

Source: Office of Customer Service Commissioner, Quarterly Pulse Check Survey Q2 2017

7.2 Channel Preference

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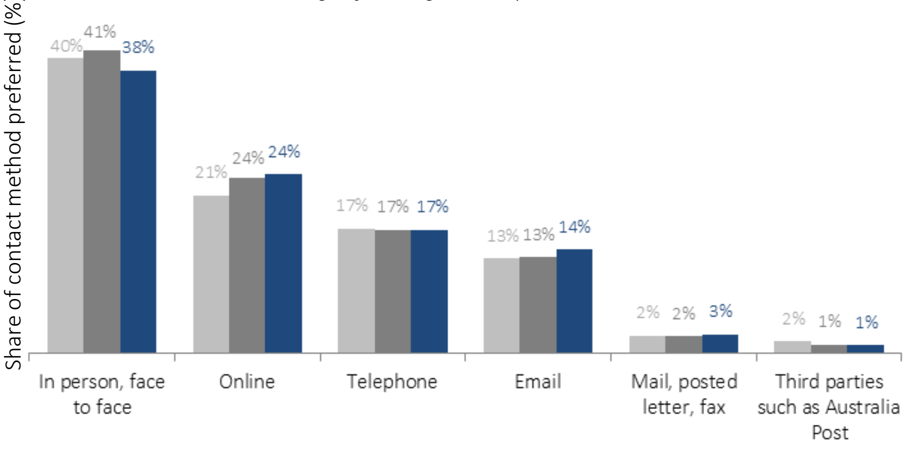
Contact Methods Preference

Consumer

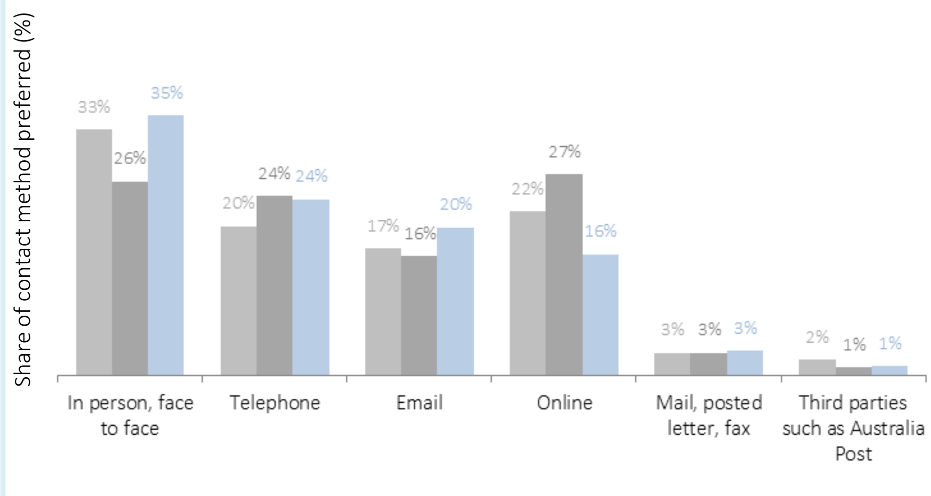
Qualitative research found that email was less preferred over in person, online and telephone because the time to receive a response was too long (over a week in some cases), if a response was received at all. Consumers preferred to use online channels for quick and simple tasks, telephone when they wished to ask a question and in person for more complex interactions (such as change of car registration).



Consumer n=1,647

Business

"In the past it was a lot easer to find information. Websites have been changed to look slick, but it is harder to find the information now. I can't get to information quickly and reliably."



Business n=391

For consumers and businesses the most preferred channels to deal with NSW Government services are face-to-face, online and telephone.

**Note: Contact methods preferred is a single response question*

Source: Office of Customer Service Commissioner, Quarterly Pulse Check Survey Q2 2017

Appendix

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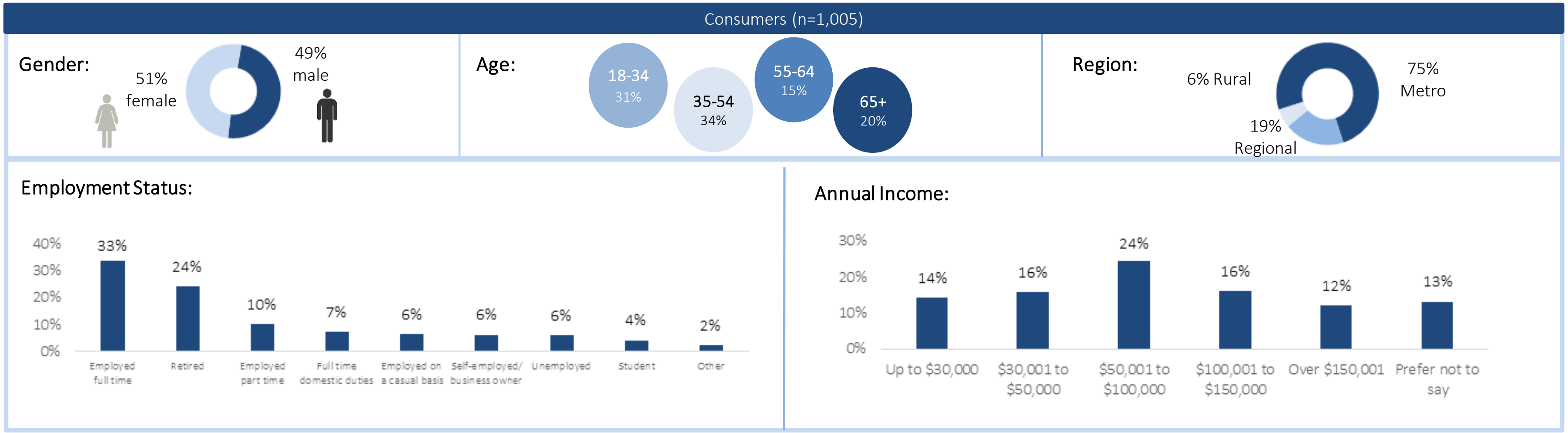
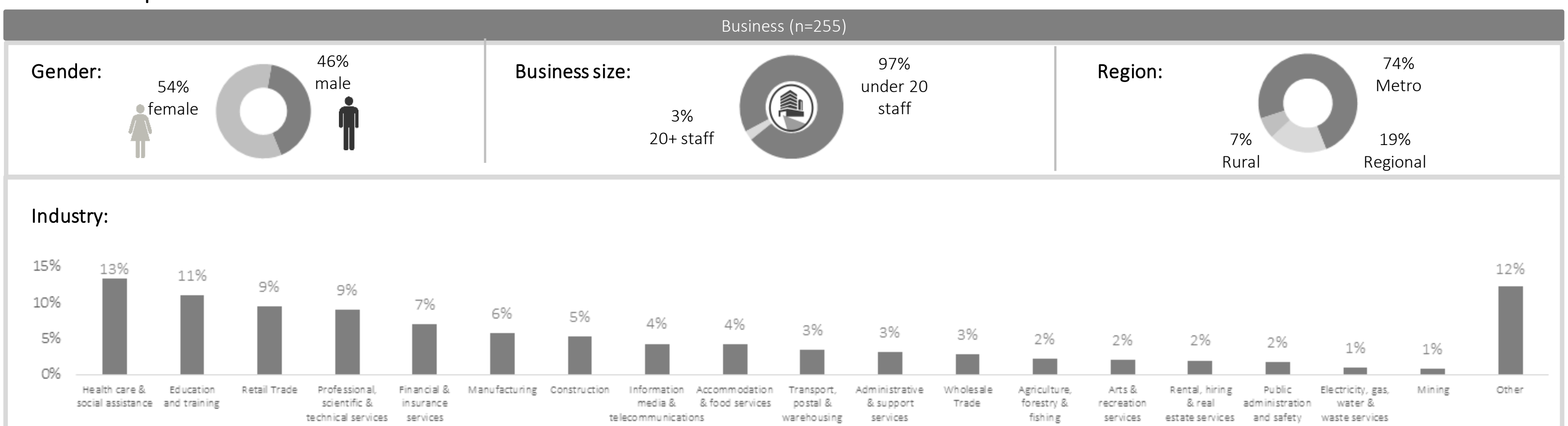
Appendix A – Demographic Profile of Respondents

Consumer Respondent Profile



Business Respondent Profile



Appendix B – Focus Group Findings – Consumer

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Understanding Overall Satisfaction with NSW Government Services

What did we want to find out?	What are the findings?
What are the key influences that contributed to low satisfaction?	• Long waiting times both on the telephone and face to face as well as inconsistent information across channels • Consumers found it difficult to navigate for the right information on websites for certain services • Consumers indicated that they had low satisfaction with services where they interacted with staff who they felt did not have the right knowledge to provide the assistance they needed or solve their specific problem • Being passed around to different staff or having to follow up with staff to get an outcome • Clear communication during initial interaction with a service resulted in high levels of satisfaction. In particular, employees having deep subject knowledge and being able to answer any questions resulted in consumers feeling confident they got the right information • Problem resolution, specifically the timeliness in which it was dealt with, was a key enabler of satisfaction • As consumers typically worked during the week, having the ability to choose a communication method that suits them had a positive impact on satisfaction
What are things that could improve overall satisfaction?	• Consumers believed that a set structure that is easy to follow and understand could improve their satisfaction with services and create consistency in the service they receive • Improving waiting times for both face to face and telephone would lead to increased satisfaction and lower customer effort • Consumers believed that speaking to the right person after their first point of contact would improve satisfaction as they were often passed around to different staff members several times and needed to repeat their situation multiple times before getting to the right person • Increased transparency of information and increased information regarding services offered would improve satisfaction • There was a perception amongst the group that frontline staff were typically not the best placed to solve any issues or questions they had. As a result, the group felt no confidence in having their issue or question progressed beyond the initial conversation. • With no visibility of internal processes, participants stated that an online tracking system to monitor the progress of their request would lift satisfaction • Phone calls were the most common method of contact as consumers preferred to speak to someone about their question. In cases where consumers emailed, they said the waiting time to receive a response was far too long (over a week), if they received a response at all • Consistency of knowledge within and between services would improve satisfaction and lower perceived effort. One participant mentioned that he called multiple times and had to visit two separate RMS centres before getting an answer • Treating consumers as a case-by-case situation would increase perceived empathy as to what their situation was. This was mentioned specifically about Police service by two participants

Appendix B – Focus Group Findings – Business

Customer Service Commissioner
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	What did we want to find out?	What are the findings?
Understanding Expectation of quality of NSW Government Services	What was driving expectations for businesses?	• It was agreed that the business community should have high expectations about the level of service they received from the NSW Government. In reality however, and as a result of past experiences, expectation was typically low to medium • Expectations were generally higher for services perceived to provide a 'more urgent service' where timeliness or the support required was important (e.g. Fire Brigades, Ambulances Services and Police) • A negative interaction with one service generally meant that this impacted their expectation of other services offered by the State Government • As expectation typically isn't high, surprising and delighting customers by exceeding their expectations would result in high levels of experienced satisfaction
Understanding Overall Satisfaction with NSW Government Services	What was driving satisfaction for businesses?	• A service partner that allowed them to spend more time running their business increased satisfaction amongst business customers. Specifically: 1) Human Interaction: Across the majority of services, customers typically got questions resolved over the phone and were most satisfied when customer service staff had deep subject knowledge and were able to communicate an outcome 2) Online: When using online services, it was agreed that the amount of content was highly praised. The ease of locating information was an enabler to satisfaction online as the volume of content increases • Trust with the service provider, specifically the person they are speaking with, and the time taken to get an outcome were important to lift satisfaction • When dealing with a customer service employee, it was difficult for businesses to separate their interaction between the service and that individual
	What were potential drivers of dissatisfaction for businesses?	• Consistency of service within and between services could be a driver of dissatisfaction. Following a poor past experience, this led to participants having mixed expectations across other State Government services • Lack of trust with service staff was a frustration and a potential driver of dissatisfaction. In particular this was around businesses not believing customer service employees did not have all the information to answer their questions • Poor communication around time taken to get an outcome and long waiting times may also be drivers of dissatisfaction. It was suggested that a concierge service for businesses may assist customers in reducing ambiguity and minimising time spent waiting

Appendix B – Focus Group Findings – Business continued

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	What did we want to find out?	What are the findings?
Understanding Customer Effort when interacting with NSW Government Services	What differentiated a low effort from a high effort dealing?	• Amongst businesses, the level of effort was related to the level of dissatisfaction they felt. That was, the more effort something took to resolve, the more dissatisfied the business customer was • Similar to the last quarter, participants found that low effort dealings are those that were efficient, not time consuming, and that can be completed online • High effort dealings were typically those that were more administrative and where problems were not resolved quickly • Across the services, participants categorised low effort services as those that were critical to the public such as emergency services and transportation
	Has effort changed over time?	• For the majority of the group, effort remained the same when dealing with services as six months ago • Where problems had not been resolved, it was suggested that more effort was needed compared to when they first used the service as they realised how much time it took to get an outcome

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