Office of Quality Performance

**Report on the Fiscal Year (FY) 2010
Field Office (FO) Telephone Service
Replacement Project (TSRP) Survey**

August 2010

Background

Under the FO TSRP, SSA is replacing the individual telephone systems in all FOs with a centralized voice-over-Internet protocol (VOIP) system. The new system not only changes the caller experience, but significantly alters the way the Office of Quality Performance (OQP) will be able to identify the sample of callers for its annual FO Caller Survey. Because the overall rating obtained in the annual FO Caller Survey is one component of the key performance measure for overall satisfaction, OQP conducted the FO TSRP survey to test the new sample identification method before implementing the annual survey for the performance indicator. The questionnaire for the survey preserved all the key rating questions from the traditional FO Caller Survey but was tailored to reflect the caller experience in TSRP offices.

Methodology

We selected a random sample of 50 FOs in which the new VOIP telephone systems had been installed for about 6 months. The mix of offices accurately represented all ten regions and all types of FOs. During a 4-week period in October 2009 we identified a random sample of callers who "got through" to the 50 FOs. The sample consisted of callers who spoke to an agent, left a voicemail or ended the call without taking one of these actions. (Unlike the traditional FO Caller Survey, in the TSRP environment callers who never got through, e.g., those who abandoned while waiting in queue or were told to call back later because the queue was full, were not available to OQP in the management information used for sampling.) Out of the sample of 2,800 eligible household callers, telephone interviews were completed with 1,339 responders, for a response rate of 48 percent.

Presentation of Results

The analysis below highlights key areas of the FY 2010 FO TSRP Survey. Throughout the discussion, the term "satisfaction" refers to combined ratings of excellent, very good and good (E/VG/G), while dissatisfaction refers to combined ratings of fair, poor and very poor (F/P/VP).

Appendix A contains an annotated questionnaire displaying response percentages and the total number of responders for all survey questions. The number of responders for each question can vary since not every question applies to each participant. As a result, percentages shown reflect the proportion of those who actually provided substantive responses to each question. (Responses such as "don't know" or "no opinion" are not generally considered substantive responses for purposes of this survey.) Appendix B contains a table that can be used to estimate the sampling variability for all of the data included in this report.

Because the FO TSRP Survey was conducted primarily to test the sample selection process and revised questionnaire, this analysis does not include any comparisons with the results of the annual FO Caller Survey.

Key Findings

Overall Satisfaction

The overall satisfaction rating reported in the FO TSRP Survey was 73 percent E/VG/G. The 27 percent of responders who were dissatisfied with overall service offered reasons that fell into three main categories. About one-third complained about access (too hard to get through; long waits on hold). A similarly large group were dissatisfied with the service they received when

they reached an agent (agent wasn't courteous; agent didn't answer questions or explain things clearly; SSA failed to act/resolve the issue). Just over one-quarter gave a low rating because the FO failed to call them back in response to their voicemail message.

Access to Telephone Service

Satisfaction with access to FO telephone service was 62 percent E/VG/G. The FO TSRP access rating was influenced, in part, by the fact that almost half (46 percent) of all responders said they had to make more than one call to get through to the FO. The majority of responders (87 percent) thought that the automated message they heard when they reached the FO was very or somewhat easy to understand.

Type of Service – Speak to an Agent

Of the 61 percent of responders who said they spoke to an agent, the majority (60 percent) said they waited on hold. Among those who had to wait, satisfaction with the amount of time they spent on hold was 58 percent E/VG/G. The great majority of responders who ultimately spoke to an agent said they were able to handle their business completely during their call (76 percent). Most callers who spoke to an agent were quite satisfied with both access (72 percent) and FO telephone service overall (86 percent).

Type of Service – Left a Voicemail

One-third of responders indicated that they left a voicemail, with most (81 percent) requesting a return call. However, only 49 percent said they received the desired call back from the FO. Callers who left a voicemail message rated access 53 percent E/VG/G; their overall service rating was the same.

Type of Service – Not Able to Get Served

A small proportion of responders (6 percent) reported that they were not served the day of their call to the FO. When asked what happened, nearly half said they hung up, primarily because they did not want to wait on hold any longer. Others reported that they heard someone answer, but the telephone system disconnected them. Some of those who were routed to voicemail found that the mailbox was full. Callers who were not served were the least satisfied by far, rating access 17 percent E/VG/G and overall service 33 percent E/VG/G.

Employee Ratings

All four employee attributes rated in the survey (courtesy, job knowledge, helpfulness and the clarity of explanations) were viewed very positively, with E/VG/G ratings ranging from 88 to 91 percent.

Satisfaction with Employee Attributes	
Aspect of Service	**E/VG/G Rating (Percent)**
Courtesy	91
Job knowledge	90
Helpfulness	88
Clear Explanations	88

Phone Quality

Callers were asked to rate the quality of the phone connection during their call. The majority (81 percent) said that the connection was about as the same as what they experience on other calls; a small group (16 percent) thought that the connection was better than usual.

General Comments

The final question of the survey gave responders the opportunity to give comments or suggestions to improve FO telephone service. The nature of the feedback, which was provided by almost half of all responders, varied considerably. Among the larger group of callers who voiced complaints, the vast majority described problems with access. By far, the most common frustration was not being able to speak directly to a phone agent, having reached the automated answering system or voice mail instead of a live person. Long waits on hold were also frequently mentioned, as was failure to receive a callback in response to a voicemail message. A small group of callers were not happy with the quality of service provided by the agent, while an almost equal number described the agents as helpful and courteous.

Appendix A - Annotated Questionnaire [a]

Survey of FO TSRP Callers
Fiscal Year (FY) 2010
All Responders

1. Thinking about how easy it was to reach the (XYZ Social Security office) the day you called, would you rate how quickly you got though as:

(R = 1,327) Percent	
17	Excellent
18	Very good
27	Good
62	**Excellent/Very Good/Good**
14	Fair
10	Poor
14	Very poor
38	**Fair/Poor/Very Poor**

2. Did you have to make more than one call that day before you were able to reach the office?

(R = 1,300) Percent	
46	Yes
54	No

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[a] Percentages may not add to 100 percent due to rounding. Similarly, for rating questions, individual and combined points of the scale may differ due to rounding. The number of responders to each question, designated as "R," is shown at the top of the column of response percentages. For questions where multiple responses were permitted, the actual number of responses is also provided.

3. When you called the office, you reached an automated message with information about their telephone service. I'd like to know how easy or hard you thought it was to understand this message. Would you say understanding the automated message was:

(R = 1,279) Percent	
53	Very easy *(Skip to question 5)*
34	Somewhat easy *(Skip to question 5)*
87	**Very Easy/Somewhat Easy**
9	Somewhat hard
4	Very hard
13	**Somewhat hard/Very Hard**

4. Why did you feel it was hard to understand the automated message?

(R = 150) 189 responses Percent	
22	Too many options; menu is too long
30	Explanations of options were confusing, unclear
22	Options did not seem to fit the situation
17	Recording quality poor (too fast, not loud enough, words garbled)
3	Non-English speaking
5	Other

5. How was your call handled that day? Did you:

(R = 1,282) Percent	
33	Leave a voicemail message *(Skip to question 6)*
61	Speak to an agent, or *(Skip to question 9)*
6	Were you not able to get served that day *(Skip to question 15)*

Questions 6 - 8 only apply to callers who left a voice mail message.

6. When you left your message on voice mail, did you:

(R = 414) Percent	
81	Ask someone to call you back
19	Leave information about your business (Skip to question 22)
<1	Do something else (Skip to question 5)

7. Did Social Security call you back?

(R = 316) Percent	
49	Yes
51	No *(Skip to question 22)*

8. Did they call you back:

(R = 152) Percent	
37	The same day
36	The next work day
22	Later, but still within about a week
5	Over a week later

(All responders to question 8 skip to question 16.)

Questions 9 – 14 only apply to callers who spoke to an agent.

9. Did you enter the name or extension of a particular person or did you just want to speak to the next available agent?

(R = 763) Percent	
20	Entered name or extension or particular agent
80	Went to next available agent

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10. Were you connected immediately to the agent or did you have to wait on hold?

(R = 752) Percent	
40	Connected immediately *(Skip to question 16)*
60	Waited on hold

11. How would you rate the amount of time you waited on hold before someone answered your call? Would you rate the amount of time as:

(R = 448) Percent	
8	Excellent
20	Very good
31	Good
58	**Excellent/Very Good/Good**
22	Fair
12	Poor
8	Very poor
42	**Fair/Poor/Very poor**

12. Did you like the music you heard while you were on hold?

(R = 355) Percent	
66	Yes *(Skip to question 16)*
28	No
6	Didn't hear music *(Skip to question 16)*

13. Why didn't you like it?

(R = 90) 93 responses Percent	
63	Prefer different type of music
3	Sound quality was poor
3	Volume was too loud or too soft
12	Boring/repetitive
5	Prefer no music
13	Some other reason

(If response to question 13 is "Prefer different type of music" (alone or in combination with other responses), continue with question 14. Otherwise, skip to question 16.)

14. What is the main type of music you prefer to listen to while on hold?

(R = 51) Percent	
11	Easy listening/pop
27	Country/folk/bluegrass
10	Rock/heavy metal
6	Hip-hop/rap
8	Jazz/blues
2	Classical/opera
36	Other

(All responders to question 14 skip to question 16.)

Question 15 only applies to callers who weren't served the day of their call.

15. What happened?

(R = 69) Percent	
15	Hung up; didn't want to leave voice mail message
32	Hung up; waited on hold too long
1	Hung up for personal reasons that had nothing to do with SSA's service
12	Heard someone answer but the phone got disconnected
6	Voice mailbox full; unable to leave message
34	Something else

(All responders to question 15 skip to question 21.)

Questions 16 - 20 only apply to callers who spoke to an agent.

16. Now I'd like to ask you several questions about your satisfaction with the service the agent gave you during your call. First, how would you rate the courtesy of the representative? Was it:

(R = 913) Percent	
50	Excellent
24	Very good
17	Good
91	**Excellent/Very Good/Good**
4	Fair
2	Poor
2	Very poor
9	**Fair/Poor/Very poor**

17. How well would you say the representative knew his/her job? Would you rate the representative's job knowledge as:

(R = 896) Percent	
45	Excellent
28	Very good
18	Good
90	**Excellent/Very Good/Good**
5	Fair
2	Poor
2	Very poor
10	**Fair/Poor/Very poor**

18. How would you rate the helpfulness of the representative during your call? Was it:

(R = 908) Percent	
44	Excellent
24	Very good
19	Good
88	**Excellent/Very Good/Good**
5	Fair
4	Poor
3	Very poor
12	**Fair/Poor/Very poor**

19. How clear were the explanations the representative gave you? Would you rate the clarity of the explanations as:

(R = 905) Percent	
41	Excellent
28	Very good
20	Good
88	**Excellent/Very Good/Good**
5	Fair
4	Poor
3	Very poor
12	**Fair/Poor/Very poor**

20. Was the representative able to take care of your business completely during your call?

(R = 901) Percent	
76	Yes *(Skip to question 22)*
24	No

21. Then what did you do, or what do you plan to do, to complete your business with Social Security? Did you or will you:

(R = 283) Percent	
14	Call Social Security's 800 number
28	Call the local Social Security office again
31	Visit the local Social Security office
1	Use the Internet or email
3	Send a letter or FAX
16	Wait for Social Security to contact you or mail something to you
6	Do something else
2	Do nothing about it

22. Overall, how would you rate the service you received the day you called the Social Security office? Was it:

(R = 1,227) Percent	
29	Excellent *(Skip to question 24)*
24	Very good *(Skip to question 24)*
19	Good *(Skip to question 24)*
73	**Excellent/Very Good/Good**
8	Fair
9	Poor
10	Very poor
27	**Fair/Poor/Very poor**

23. Why did you rate the telephone service in this office as fair, poor or very poor?

(R = 340) 515 responses Percent	
21	It was too hard to get through
12	Wait time too long
13	Representative didn't answer the question/didn't explain things well
5	Representative was not courteous
11	Social Security failed to take the requested action/problem not solved
3	Don't like having to listen to automated messages or pressing numbers
1	Don't like leaving a message in voicemail
3	Transferred too many times/got the runaround
1	Recording was hard to understand
27	Employee never called back/slow to respond
4	Something else

24. If you contact Social Security for future business, what are you most likely to do? Will you:

(R = 1,258) Percent	
19	Call the 800 number
53	Call your local office
21	Visit your local office
4	Use the Internet or email
1	Write a letter
<1	Send a FAX
2	Do something else

25. To help Social Security better understand how to improve its telephone service, they'd like to know why you were calling the office. Can you tell me the main type of business you called about that day?

(R = 1,221) Percent	
19	Applying for benefits or checking on an application that was already filed
45	Reporting a change affecting benefits/asking a question
7	Social Security Statement/benefit estimate/earnings issue *(Skip to question 27)*
3	Social Security number (SSN) card *(Skip to question 27)*
3	Filing appeal *(Skip to question 27)*
5	Medicare information or replacement card *(Skip to question 27)*
2	Review of case
1	Overpayment of benefits
4	Representative payee situation
2	Proof of current payments
7	Something else *(Skip to question 27)*

26. Social Security would also like to know what kind of benefits were you calling about. Please answer 'yes' or 'no' as I read each type of benefit. Were you calling about:

(R = 796) 1,203 responses Percent	
18	Retirement/Survivors
37	Disability
32	Supplemental Security Income (SSI)
7	Medicare
6	Medicaid

27. Now I want to ask you about the quality of the phone connection during your call. Compared to all the other calls you make from the <u>same</u> phone you used to call the Social Security office, would you say the quality of the phone connection that day was:

(R = 1,241) Percent		
16	Better than on other calls	*(Skip to question 29)*
81	About the same as on other calls	*(Skip to question 29)*
3	Worse than on other calls	

28. What problems did you have that made you say it was worse?

Data not displayed because number of responders **(R = 19)** too small to yield statistically reliable data.

29. Do you have any comments or suggestions to help improve telephone service in the *(insert city from sample file)* Social Security office?

(R = 1,263) Percent	
46	Yes
54	No

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Appendix B - Table for Determining Approximate Sampling Variability

To use this table to determine the approximate sampling variability around a reported rating, first locate the sample size closest to the number of responders for the particular stratum. Then find the percentage estimate (i.e., the rating). If you need to estimate the sampling variability for a percentage estimate less than 50 percent, subtract the percentage estimate from 100 percent and use the result.

SAMPLE SIZE	

PERCENTAGE ESTIMATE										
SAMPLE SIZE	**95%**	**90%**	**85%**	**80%**	**75%**	**70%**	**65%**	**60%**	**55%**	**50%**
50	±6.0	±8.3	±9.9	±11.1	±12.0	±12.7	±13.2	±13.6	±13.8	±13.9
100	4.3	5.9	7.0	7.8	8.5	9.0	9.3	9.6	9.8	9.8
150	3.5	4.8	5.7	6.4	6.9	7.3	7.6	7.8	8.0	8.0
200	3.0	4.2	4.9	5.5	6.0	6.4	6.6	6.8	6.9	6.9
250	2.7	3.7	4.4	5.0	5.4	5.7	5.9	6.1	6.2	6.2
300	2.5	3.4	4.0	4.5	4.9	5.2	5.4	5.5	5.6	5.7
400	2.1	2.9	3.5	3.9	4.2	4.5	4.7	4.8	4.9	4.9
500	1.9	2.6	3.1	3.5	3.8	4.0	4.2	4.3	4.4	4.4
600	1.7	2.4	2.9	3.2	3.5	3.7	3.8	3.9	4.0	4.0
700	1.6	2.2	2.6	3.0	3.2	3.4	3.5	3.6	3.7	3.7
800	1.5	2.1	2.5	2.8	3.0	3.2	3.3	3.4	3.4	3.5
1000	1.4	1.9	2.2	2.5	2.7	2.8	3.0	3.0	3.1	3.1
1200	1.2	1.7	2.0	2.3	2.5	2.6	2.7	2.8	2.8	2.8
1400	1.1	1.6	1.9	2.1	2.3	2.4	2.5	2.6	2.6	2.6

For example, to determine the sampling variability for the percentage of all responders rating overall service excellent, very good or good (E/VG/G) (73 percent/1,277 responders), go to the row that is closest to the number of responders (1,200) and then to the column closest to 73 percent (75 percent) and read the sampling variability (+/-2.5 percent). This means that the approximate 95-percent confidence level interval around the 73 percent satisfaction rating ranges from 70.5 percent (73 percent minus 2.5 percent = 70.5 percent) to 75.5 percent (73 percent plus 2.5 percent = 75.5 percent).