

EMPLOYMENT AND SOCIAL DEVELOPMENT CANADA [ESDC]

SERVICE CANADA

Client Experience Survey 2017

POR # 092-16

CONTRACT AWARD DATE: 2017-01-06

CONTRACT #G9292-178217/001/CY

MARCH 30, 2018

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EXECUTIVE SUMMARY

RESEARCH BACKGROUND AND OBJECTIVES

As part of Service Canada's Service Transformation Plan, the Citizen Service Branch (CSB) within Employment and Social Development Canada (ESDC) required data on its service experience from the client's perspective to support effective management of its service delivery.

The 2017 Client Experience Survey establishes a baseline of service delivery performance for the purpose of tracking change in the end-to-end client experience over time. This approach examines the overall service design as experienced by clients to assess how well it works for them as they access programs through Service Canada's service delivery system.

The Client Experience Measurement Project was conducted in two phases. The first phase involved conducting focus groups and interviews with clients regarding their client journeys, and the results were used to assess the comprehensiveness of the Client Experience Survey Measurement Model. The model was developed by Service Canada as a framework to gathering client experience data from Service Canada clients in a consistent way. A short summary of the results of the qualitative phase are found in Appendix A.

Specific research objectives for the second, quantitative phase include:

- Providing a baseline measurement of the multi-channel client experience;
- Providing broad diagnostic insights regarding the opportunities for improvement;
- Identifying challenges encountered by vulnerable groups in using the service delivery processes to access services; and
- Providing baseline results measures of the proportion of clients choosing self-service, low and high-touch assistance.

METHODOLOGY

- A telephone survey was conducted with a sample of 4,001 Service Canada clients across the six major programs, with around 600 respondents interviewed about their experience with each program. Programs covered included:
 - Employment Insurance (EI)
 - Canada Pension Plan (CPP)
 - Canada Pension Plan Disability Benefit (CPP-D)
 - Old Age Security (OAS)
 - Guaranteed Income Supplement (GIS) and
 - Social Insurance Number (SIN).
- Oversamples were conducted with two of the vulnerable client groups: those living in remote areas and official language minority community members (OLMC) . (See the Appendix B for the specifications of vulnerable client groups.) This was done to provide a minimum of 200 completed questionnaires with each group.
- The interviews were conducted from September 25 to December 10, 2017.
- The sample was randomly selected from among clients who had received a service outcome during April, May or June 2017. This period extended from January to July for some programs to ensure sufficient sample size.
- Data based on the total population has a margin of error of +/-2.5% at the 95% confidence interval, while data based on sub-groups have a larger margin of error. For example, the margin of error for data for each program is between +/-4% to +/-5%.
- The data have been weighted in proportion to age/gender/region proportions within each region, and by program volume.

KEY FINDINGS – OVERALL PERFORMANCE

Overall satisfaction was high for most clients accessing a program delivered by Service Canada

- Overall, more than eight in ten clients were satisfied with the service they received from Service Canada, of which more than six in ten provided a rating of five out of five.
- Overall ease and smooth movement through the steps (effectiveness) were also high.
- These findings reflect the composition of Service Canada clients who had recently completed a client journey, as reflected in the program databases. Almost half of these clients were clients of the EI program. Almost one third had received a Social Insurance Number. The remainder were CPP, OAS, GIS and CPP-D clients.

Service Canada clients rate the service most highly on helpfulness of staff, confidence in security of information, and receiving service in official language of choice

- Clients consistently rated the service by staff very highly; 9 in 10 found staff helpful in both the in-person and phone channels.
- Other consistently high-performing measures across all programs were clients' levels of confidence that their personal information was protected, and being provided service or documents in their choice of English or French in an office.

Service attributes with lower ratings were ease of following up and of resolving problems, and confidence in timely processing

- Four in five reported completing the client journey without an issue or problem. However, among those who did experience an issue or problem, there were low client ratings across all programs regarding easily resolving these problems.
- Confidence in timely processing and ease of follow-up were consistently lower rated attributes across programs.

KEY FINDINGS – SERVICE CHANNEL PERFORMANCE

Satisfaction was high with all channels; the higher the touch, the higher the service channel rating

- Consistent with other government studies, satisfaction is highest for the in-person channel (89%). The specialized call centre satisfaction was slightly lower, while remaining high (82%). Satisfaction with the online channel is somewhat lower still (79%), which is not entirely surprising as it does not involve human contact (a “lower touch” channel).
- Most clients of the in-person channel found it was easy to get to, and that staff were helpful and answered the clients’ questions completely.
- Similarly, most clients of the specialized call centres also found that staff were helpful and answered the clients’ questions completely.
- Clients of the online channel reported that they got what they needed at the stage of informing themselves about the program, even though fewer could see how the information applied to their specific situation.
- Among the portion of the EI, CPP and OAS clients who reported using the My Service Canada Account, most got what they needed. While slightly fewer reported that it was easy to use, this was still four in five users.

Channel Service Standards

- Most clients found the current travel distance to be reasonable, reporting that they found a travel distance reasonable up to 24 km. The rating dropped substantially at more than 50 km.
- The vast majority of in-person clients reported receiving service and documents in the official language of their choice.
- Just under half of the callers to the specialized call centres found the current wait time to be reasonable; two thirds were able to get through after one or two attempts. Callers were more likely to find the wait time reasonable if it were under five minutes.

KEY FINDINGS: PROGRAMS

Some attributes were consistently high or low across all programs

- Across all programs, being provided service or documents in the official language of choice in an office, helpfulness of in-person staff, and confidence that personal information was protected were the highest rated areas. Problem/issue resolution among those who experienced a problem is the lowest rated area for each program. (Note that service delivery in language of choice was measured for the in-person channel only through this survey.)

Clients found the delivery of SIN to be easiest and most efficient

- Delivery of the Social Insurance Number is the service with the easiest and most efficient service experience. Clients found the process clear and could move through the steps effectively. However, about 15% did not find aspects of preparing to apply easy.

CPP and OAS perform particularly well on most attributes

- Among the pension programs delivered largely to seniors, the Canada Pension Plan - Retirement Benefits and Survivor Benefits (CPP), Old Age Security (OAS), and Guaranteed Income Supplement (GIS), the first two perform well on most attributes. Notably, the OAS clients who were auto-enrolled were more likely than those who submitted an application to be very satisfied.
- Among both CPP and OAS clients, the overall process was found to be easy. Lower scores related to finding and understanding information about the program.

GIS clients needs were met slightly less often than other pension programs for seniors

- The delivery of GIS meets clients' needs at a slightly lower rate than other pension delivery to seniors. While over 4 in 5 found the overall process easy and could get help when they needed it, clients were less likely to say it was easy to find and understand information on the program, and to be confident they had what they needed to complete the application.

KEY FINDINGS: PROGRAMS

EI meets the needs of most clients, but at a slightly lower rate than higher-performing programs

- Similar to GIS, most Employment Insurance (EI) clients rate the service attributes highly, but at a slightly lower rate than SIN, CPP and OAS. Over 1 in 5 found the overall process of applying for the program to be easy, however only 66% were confident that their application would be processed in a reasonable amount of time.

CPP-D clients encounter the most difficulty across the service experience

- Clients of Canada Pension Plan - Disability Benefit (CPP-D) rated the service delivery process poorly across most service dimensions. Although the rate at which applicants are granted benefits is much lower for CPP-D than for other programs, and this may have some impact on clients' assessment of the service delivery, much appears to be associated with the service delivery itself rather than the service outcome.
 - For example, many clients who have not been granted a benefit do rate the service delivery highly, while aspects of the service delivery, such as encountering a problem, are related to satisfaction.
 - Further, there is variation in the scoring of service attributes showing that respondents are assessing the service attributes specifically. Some attributes are rated highly by CPP-D clients, including confidence in the protection of personal information.
 - The attributes that have the lowest ratings are related to ease of understanding, ease of putting together information required for the application, and problem resolution.

KEY FINDINGS: VULNERABLE CLIENT GROUPS

Most of the vulnerable client groups that Service Canada serves rate the service experience highly

- Most clients in vulnerable groups appear to be well-served through the current service design. This includes clients with lower education and clients who are e-vulnerable (rarely or never use online services).
- Remote clients do not appear to have a lower satisfaction rate, keeping in mind the smaller sample size (n=204) for this group, which increases the margin of error.

Indigenous clients and those with restrictions affecting access have a poorer service experience

- The two client groups who do experience lower satisfaction scores and rate some service attributes less highly are:
 - Indigenous clients
 - appear to be less likely to find it easy to quickly gather and to understand information about the program/application
 - Clients who feel they have restrictions that make it more difficult to access service
 - appear to be less likely to find the service experience easy, timely or effective

Generally, vulnerable groups are more likely to use the in-person channel

- The vulnerable groups who are more likely to use the in-person channel to apply for programs are official language minority community members, clients with high school education or less, the e-vulnerable, youth and Indigenous clients.
- Seniors (aged 60 and over) use the in-person channel at about the same rate as clients overall; just over half used the in-person channel to apply.

KEY FINDINGS: THE OMNI-CHANNEL EXPERIENCE ACROSS THE CLIENT JOURNEY

Self-service and Assisted Service

- Currently, 75% of Service Canada's clients use assisted service* during the client journey when accessing the programs it delivers.
- With the existing service design, Service Canada provides service to the nearly two thirds of its clients through its in-person network of offices.
- At the same time, one-quarter of the clientele self-served* throughout the client experience without assistance. They did so through either or both the web and mail channels.

Satisfaction with the level of service declined with the number of times the client contacted Service Canada.

- Clients who contacted Service Canada only one or two times had the highest satisfaction, declining with the greater number of occasions they were in contact, particularly among those who had contact five or more times.

Over time, if the service design for various programs changes, the overall channel use pattern may also shift.

*Note: Self-service: used web channel and/or mail only
Low-touch assisted service: used phone but not in-person
High-touch assisted service: used in-person

KEY FINDINGS: POTENTIAL FOR CHANGE

The service attributes for which impact is highest and scores are lowest relative to other attributes for the overall clientele are:

- 1) Ease of problem resolution
 - 2) Ease of getting assistance when needed
 - 3) The amount of time it takes to go through the client journey (up to initial decision)
- However, improvement in any one area alone may have a negligible impact on the overall satisfaction figure, as satisfaction is already high.
- The challenge will be to maintain the current high level of satisfaction, and to make improvements to the overall client journey experience for the smaller groups of clients who encounter more challenges across the client journey:
 - Clients of CPP-D
 - Clients who have restrictions that make it difficult to access service
 - Indigenous clients