

CANADA REVENUE AGENCY DETAILED ACTION PLAN

to the recommendations of the **Call Centres Audit (Report 2)** of the Fall 2017 Reports of the Auditor General of Canada

Report Ref. No.	OAG Recommendation	Departmental Response	Description of Final Expected Outcome/Result	Expected Final Completion Date	Key Interim Milestones (Description/Dates)	Responsible Organization/ Point of Contact (Name, Position, Tel #)	Indicator of Achievement (For Committee Use Only)
32	<p>The Canada Revenue Agency should:</p> <ul style="list-style-type: none"> • review how it manages its incoming calls to improve access by considering practices such as increasing their maximum wait times to speak with an agent, and • consider giving callers information on call wait times to access an agent so they can decide if they prefer to wait, use self-service options such as the website, or call back later. 	<p>Agreed. The Canada Revenue Agency's aging call centre technology does not allow it to automatically route incoming calls to the next available agent across its national network, nor is it capable of providing callers with the estimated wait time to be served by an agent. As a result, the Agency manages the number of callers who can access its phone queues at each site. By limiting the number of callers who join the queue, the Agency can maintain reasonable wait times for those in the queue. (The current service standard is two minutes or less, 80 percent of the time). As a result, when call volumes are high, it often takes callers several tries to get into the queue to speak with an agent.</p> <p>In summer 2017, the Canada Revenue Agency signed a commitment to transition its call centres to a new telephony platform as part of the Government of Canada's Contact Centre Transformation Initiative. The migration is expected to begin in</p>	<p>Callers will have the information on wait times as well as service options available to them to decide how they would best be served.</p> <p>Callers will have the option to wait to speak to an agent.</p>	End of fiscal 2018/19	<p>In January 2017, CRA began offering callers who could not access the queues to the Individual Tax Enquiry (ITE) and Benefits lines, immediate access to an automated IVR ("overflow") system with self-serve options, as an alternative to a busy signal.</p> <p>Pilots were launched in April (Business Enquiries) and June (Income Tax Enquiries) of 2017 to examine the impacts of extending callers' wait times in the queue. Given the findings of these pilots, the CRA has increased queue wait times to 5 minutes, allowing more callers to have access to agent queues. We are monitoring the impacts of this change through callers' feedback.</p> <p>Between now and July 2018, the CRA will consult Canadians on wait time preferences and to identify opportunities to further expand self-service options in its IVR.</p> <p>Further adjustments to service standards will be assessed once the Hosted Contact Centre Services (HCCS) solution is operational and callers have been surveyed with respect to wait time</p>	CRA Gillian Pranke, Director General 613-957-9362	

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		<p>early 2018, with the bulk of the transition being completed by the end of 2018. This new technology will allow the Agency to inform callers of estimated wait times to speak with an agent. Being able to predict wait times will allow the Agency to adjust its current approach of managing incoming calls so as to allow more callers to access the agent queues.</p> <p>In the interim, throughout the 2017-18 fiscal year, the Canada Revenue Agency will examine how it manages wait times in an effort to reduce the number of attempts that callers need to make to reach a call centre agent. In doing so, the Agency will consult with Canadians on acceptable wait times and update its service standards by the end of the 2017–18 fiscal year.</p> <p>Additionally, the Agency will continue to enhance the self-service options available in its Interactive Voice Response system so as to offer callers more self-service options where possible instead of waiting to speak with an agent.</p>			<p>preferences.</p> <p>With its migration to the HCCS, the CRA will be transforming its traffic management strategy. HCCS is expected to be implemented in spring 2018 for Business Enquiries and summer 2018 for Individual Enquiries. The HCCS will allow for the introduction of a national queue which will result in a more effective distribution of calls across the CRA's national network.</p> <p>With HCCS, callers wanting to speak with an agent will be given an expected wait time and will have the choice as to whether to stay on the line, choose a self-serve option or call back if the expected wait time is too long.</p> <p>Despite the CRA's upcoming move to HCCS, there may be times when call demand still exceeds capacity. During these times the CRA will continue to encourage callers to self-serve in the IVR through the use of an overflow IVR.</p> <p>In February 2018, a new IVR self-service option will be available to allow callers to obtain their account balance and payment information without needing to speak to an agent.</p> <p>By March 2019, the CRA will further</p>		

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					expand the self-service options in its IVR system (based on consultations and experience with the new technology).		
66	<p>The Canada Revenue Agency should ensure that its quality assurance practices generate results that are more effective in order to improve accuracy, identify opportunities for continuous improvements, and identify and monitor training needs.</p>	<p>Agreed. The Canada Revenue Agency is committed to ensuring that its quality assurance practices are effective and result in improved accuracy, and has developed a three-pronged improvement plan.</p> <p>First, in the fourth quarter of the 2017–18 fiscal year, the Agency will launch a new approach to training and evaluating agents to better assess agent readiness across the national network.</p> <p>Second, technology will be improved. The current call centre technology is outdated and does not offer industry-leading quality assurance features. The new telephony platform will offer the Agency modern call monitoring tools. These features will be implemented in call centres in the 2018–19 fiscal year, and will strengthen quality and accuracy assessments. Until the new technology is in place, the Agency will continue to examine quality issues that are raised to correct them through the training programs.</p> <p>Finally, as part of this migration, the</p>	<p>The quality assurance practices will provide more effective results of call accuracy that will allow for identification of opportunities for improvement, and training needs.</p>	<p>End of fiscal 2018/19</p>	<p>The CRA has recently improved its approach to the training of call centre agents across the national network in order to better assess readiness and proficiency. Implementation of this new approach began in the fall of 2017 and is currently being rolled out nationally across all call centres.</p> <p>In October 2017, improvements were made to the suite of agent desktop tools allowing agents to access information more quickly.</p> <p>New call recording and listening tools available under HCCS will strengthen CRA's ability to monitor quality and accuracy. These tools will also allow the CRA to be able to target call topics for monitoring which is a more efficient approach to identifying agent coaching and learning needs.</p> <p>The new skills-based routing functionality available with HCCS will allow for improved accuracy as call topics can be directed to specific agent groups rather than all calls flowing through front line "general" agents as is the approach today,</p>	<p>CRA Gillian Pranke, Director General 613-957-9362</p>	

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		<p>Agency will establish a new national quality monitoring team in spring 2018 to supplement existing local quality practices. This will ensure consistency across the national network, leverage quality improvement features available with the new technology, facilitate continuous improvement, and identify training needs, all of which will benefit Canadians when they interact with the Agency.</p>			<p>A new quality and accuracy evaluation tool that measures the accuracy of the response and the actions taken by agents has been developed. This tool will increase the consistency of listener evaluations by reducing ambiguity and complexity. It will be adopted with the migration to HCCS by summer of 2018.</p> <p>The CRA will create a centralized team that will use new listening tools available with the HCCS to evaluate the accuracy of information provided to taxpayers. This new team will further contribute to the identification of opportunities to strengthen reference materials and training or further improve or streamline business processes.</p>		
83	<p>The Canada Revenue Agency should assess and improve performance indicators and reporting on accessibility, accuracy, and timeliness of its call centre services.</p>	<p>Agreed. The Canada Revenue Agency has expanded the information provided in its annual Departmental Results Report, beginning with the report for the 2016–17 fiscal year, to provide Canadians with more information about the performance of its call centres. This document is public and available to all Canadians.</p> <p>The current call centre technology does not allow for sophisticated, comprehensive, or standardized reporting across the Agency's</p>	<p>The Canada Revenue Agency will assess and improve performance indicators and reporting on accessibility, accuracy, and timeliness of its call centre services.</p> <p>Improved predictability of the service experience when accessing CRA.</p>	End of fiscal 2018/19	<p>The CRA has expanded the information provided in the annual Departmental Results Report beginning with the report for the 2016-2017 fiscal year. It now provides data on the number of calls answered, abandoned in the queue, served in the IVR or presented with a busy signal. These changes were made so as to provide more information on the performance of the Agency's call centres. This document is a public document and available to Canadians.</p> <p>The CRA will improve the transparency and frequency in reporting on results to</p>	CRA Gillian Pranke, Director General 613-957-9362	

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		<p>national call centre network. The migration to a new telephony platform will offer the Agency enhanced measurement and reporting tools, which will contribute to improved and consistent reporting and performance measures.</p> <p>The migration will also provide an opportunity for the Agency to review the performance indicators it uses to measure its call centre services. The Agency will complete its review and update its performance indicators by the end of the 2017–18 fiscal year.</p>			<p>Canadians. It will report on the number of calls that are able to access its system as well as those that spoke with an agent and those who self-served in the IVR.</p> <p>Adjustments to service standards will be assessed for 2019-20 based on consultations and experience with the new technology.</p> <p>Beginning in April 2018, the CRA will report internally on caller satisfaction. This data will be incorporated into the Agency-wide feedback model.</p> <p>The new national quality monitoring team will begin to use the new quality and accuracy evaluation tool available under the HCCS to measure accuracy levels.</p>		