FYs 2020–2021 Agency Priority Goal Action Plan

Improve the National 800 Number Service

Goal Leaders:
Goal Leader: Erik Jones, Assistant Deputy Commissioner, Office of Operations
Deputy Goal Leader: Jim Borland, Assistant Deputy Commissioner, Office of Systems
Overview

Goal Statement and Targets

Improve the customer experience by reducing the Average Speed of Answer on the National 800 Number. ¹

• By September 30, 2020, achieve an average speed of answer of 17 minutes.
• By September 30, 2021, achieve an average speed of answer of 11 minutes.

¹ This target is also a budgeted workload measure (BWM) and as such are estimates. BWM estimates are updated each year with the President’s Budget. The FY 2021 target will be finalized with the FY 2021 enacted appropriation.
Overview

Challenge

Customers who call Social Security’s National 800 Number service often experience lengthy wait times to speak to an agent. These wait times are attributed to several factors, including a decline in agent staffing due to attrition, and limited replacement hiring. For example, the agency dropped from a high of 4,857 on-duty National 800 Number staff in fiscal year (FY) 2011 to only 4,235 on-duty staff at the start of FY 2019. Additional factors contributing to long wait times include training issues and limited self-service options available to the public.

Opportunities

We have several efforts underway to address our challenges. We plan to:

• Hire new agents to address attrition and maintain an appropriate level of staffing;
• Streamline training to allow agents to be productive faster;
• Enhance current self-service options so callers do not have to wait to speak with an agent; and
• Provide a more modernized unified communications platform (UCP) that will improve service to our National 800 Number callers.
Leadership and Implementation Team

Office of Operations
APG Leadership and Implementation Teams

Leadership Team

Erik Jones, Assistant Deputy Commissioner (Office of Operations)
Goal Leader

Jim Borland, Assistant Deputy Commissioner (Office of Systems)
Deputy Goal Leader

Implementation Team

Associate Commissioner (Office of Operations)
Office of Customer Service

Associate Commissioner (Office of Systems)
Office of Hardware Engineering

Division Director (Office of Operations)
Office of Customer Service, Division for Contact Center Services

Regional Commissioners (Office of Operations)
Regional Offices (excluding Boston and Denver)
Goal Structure and Strategies

The National 800 Number APG supports the following strategic goal and objective defined in our FYs 2018–2022 Agency Strategic Plan.

- **Strategic Goal 1: Deliver Services Effectively**
- **Strategic Objective 1.1: Improve Service Delivery**

By focusing on increasing staffing and improving our technology and training, we will:

- Answer calls faster;
- Answer more calls before a customer encounters an agent busy call back message; and
- Increase the number of self-service options.

Key indicators of success in our goal progress include:

- **Reduction in Average Speed of Answer:** The Average Speed of Answer is the average amount of time callers wait in queue to be answered by an agent. Wait time begins when the call is placed in queue and ends when the agent answers.
- **Reduction in Agent Busy Rate:** The Agent Busy Rate is the percentage of calls routed for live agent service that encounter a busy call back message.
- **Increase in Calls Handled:** The total number of calls handled by agents and automation on the National 800 Number.
Goal Structure and Strategies

Implementation Strategies:

• Increasing Agent Staffing: In addition to replacing losses due to attrition, we plan to hire an additional 1,000 agents in FY 2020 to address the shortfall.

• Incorporating New Training Model: We will streamline training into two phases to enable new hires to become more productive in a shorter amount of time.

• Implementing Technology Improvements: We will launch self-service applications, enabling callers to complete additional actions without an agent.

• Monitoring Call Trends: We will continue to monitor call trends relating to fraudulent Social Security schemes to ensure our public education campaign reduces scam-related call volumes.
Summary of Progress – FY 2020 Q3

Overall APG Progress
We remain on track to meet our Average Speed of Answer (ASA) and Agent Busy Rate (ABR) FY 2020 targets. While the ASA and ABR were initially higher than pre-COVID levels, they significantly improved during this quarter. As of the end of the third quarter, our ASA was 16.2 minutes, we achieved an ABR of 9.4 percent, and we handled over 26.2 million calls.²

Although COVID-19 caused National 800 Number hiring delays this quarter, we have more agents available now to assist callers by phone compared to the first quarter because we acquired additional telework equipment.³ While our field offices are open for limited, dire need appointments, we continue to offer services by phone and online. We are operating two telephone platforms simultaneously to accommodate the increased volume of agents and callers. Local representatives remain available to provide telephone service Monday through Friday from 8:00 a.m. to 5:30 p.m.

We increased our marketing efforts to ensure the public’s awareness of our service options during this unprecedented time. We also displayed new signage on the doors of our local offices and mailed letters to the public to advertise our phone and online services.

We continue to make technology advancements to improve our 800 Number services. At the end of the third quarter, we awarded a new contract for a modernized UCP ahead of our fourth quarter milestone. We are developing an Interactive Voice Response (IVR) enhancement to allow customers to change their mailing address. We anticipate deploying the updated IVR in FY 2021.

² FY 2020 results are through June 30, 2020, which is the end of the calendar month.
³ Effective March 17, we took steps to protect the public and our employees from COVID-19. At this time, we are still assessing how the COVID-19 pandemic will impact our workload performance ([and hiring] where appropriate).
Key Milestones

We have identified quarterly milestones to assess our progress toward completing the National 800 Number goal.

<table>
<thead>
<tr>
<th>Key Milestones</th>
<th>Milestone Due Date</th>
<th>Milestone Status</th>
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</thead>
<tbody>
<tr>
<td><strong>FY 2020</strong></td>
<td></td>
<td></td>
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<tr>
<td>On-board 400 newly hired National 800 Number agents</td>
<td>Q1</td>
<td>Complete</td>
</tr>
<tr>
<td>Release new 800 Number and OIG fraud hotline message to inform the public of Social Security impersonation scams</td>
<td>Q1</td>
<td>Complete</td>
</tr>
<tr>
<td>Enable simplified authentication for Interactive Voice Response (IVR) for Claims Status callers</td>
<td>Q2</td>
<td>Complete</td>
</tr>
<tr>
<td>Complete initial training for 400 newly hired National 800 Number agents</td>
<td>Q2</td>
<td>Complete</td>
</tr>
<tr>
<td>On-board 500 newly hired National 800 number agents</td>
<td>Q3</td>
<td>Not Met</td>
</tr>
<tr>
<td>Complete initial training for 500 newly hired National 800 number agents</td>
<td>Q4</td>
<td>Not On-Track</td>
</tr>
<tr>
<td>Award new contract for a modernized UCP</td>
<td>Q4</td>
<td>On-Track</td>
</tr>
<tr>
<td><strong>FY 2021</strong></td>
<td></td>
<td></td>
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<tr>
<td>Establish core IT infrastructure for the modernized UCP</td>
<td>Q1</td>
<td></td>
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<tr>
<td>Implement three new IVR improvements</td>
<td>Q2</td>
<td></td>
</tr>
<tr>
<td>Complete employee training on the modernized UCP</td>
<td>Q3</td>
<td></td>
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<tr>
<td>Evaluate the implementation of the UCP and update strategies for continuing to improve 800 number services</td>
<td>Q4</td>
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**Key Indicators**

**Primary Indicator:** Average Speed of Answer

- FY 2020 Target: 17 minutes
- FYTD 2020 Results: 16.2 minutes

![National 800# Average Speed of Answer (Monthly Average Results)](chart.png)
Key Indicators

**Historical Data**

Reduction in Average Speed of Answer:

- FY 2020 Target: We plan to reduce our average speed of answer to 17 minutes.
- FY 2021 Target: We plan to reduce our average speed of answer to 11 minutes.

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4 This target is also a BWM and as such are estimates. BWM estimates are updated each year with the President’s Budget. The FY 2021 target will be finalized with the FY 2021 enacted appropriation.
**Secondary Indicator:** Agent Busy Rate

- FY 2020 Target: 12 percent
- FYTD 2020 Results: 9.4 percent
Key Indicators

**Historical Data**

Reduction in Agent Busy Rate⁵:

- **FY 2020 Target:** We plan to reduce our agent busy rate to 12 percent.
- **FY 2021 Target:** We plan to reduce our agent busy rate to 7 percent.

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⁵ This target is also a BWM and as such are estimates. BWM estimates are updated each year with the President’s Budget. The FY 2021 target will be finalized with the FY 2021 enacted appropriation.
**Key Indicators**

**Secondary Indicator:** Calls Handled

- FY 2020 Target: 36 million
- FYTD 2020 Results: 26,283,669
Key Indicators

Historical Data
Increase in Calls Handled:

- FY 2020 Target: We plan to increase our total calls handled to 36 million.
- FY 2021 Target: We plan to increase our total calls handled to 41 million.

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6 This target is also a BWM and as such are estimates. BWM estimates are updated each year with the President’s Budget. The FY 2021 target will be finalized with the FY 2021 enacted appropriation.
Assumptions and Risks

We have identified the following assumptions for accomplishing the goal. We have also identified the following risks that could affect our progress along with mitigation plans to address these risks.

<table>
<thead>
<tr>
<th>Assumptions</th>
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</thead>
<tbody>
<tr>
<td>Availability of qualified candidates</td>
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<tr>
<td>Normal levels of agent attrition</td>
</tr>
<tr>
<td>Stable call volumes</td>
</tr>
<tr>
<td>Adequate resources for hiring and technology modernization</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Key Risks</th>
<th>Mitigation</th>
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<tbody>
<tr>
<td>Failure to resolve authentication challenges to enable IVR</td>
<td>We developed a Digital Identity Strategy to advance our agency’s plan to improve the existing Digital Identity system, develop authentication for IVR telephone services, and enter into partnerships with trusted third parties (Identity Federation).</td>
</tr>
<tr>
<td>High turnover/attrition/inadequate candidate pool</td>
<td>With sufficient budgetary resources, we can replace our agent losses with qualified candidates.</td>
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<td>Delay in awarding the new UCP contract</td>
<td>We continue to explore updating and deploying IVR applications on the existing communications platform as we await the awarding of the new UCP contract.</td>
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<tr>
<td>Increase in spoofing</td>
<td>We will continue to support efforts to identify scammers misusing our telephone services and take necessary appropriate actions.</td>
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</tbody>
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Data Accuracy and Reliability

Our National 800 Number service data comes from AT&T through their Automated Call Distribution tool. There are no known data or system limitations.

During the initial contract award, we tested and confirmed the data accuracy from the vendor. As a result, we used the validated data to create SSA’s *Operational Data Store* (ODS). We use the ODS to create standard reports to monitor our performance on the following key indicators: The Average Speed of Answer, Agent Busy Rate, and Call Volumes.

We created the *Daily Telephone Service Performance Dashboard* to monitor our service performance for these key indicator metrics.
Additional Information

Internal Stakeholders

Employees: Our National 800 Number Network Agents are dedicated public servants committed to providing accurate and timely service to the public.

Office of Human Resources (OHR): We work with the OHR to hire new employees, and develop and deliver training.

Office of Acquisitions and Grants (OAG): We collaborate with OAG to address acquisition planning and procurement needs, including purchasing major IT services and products to support the agency’s communication platforms.

Office of the Inspector General (OIG): We collaborate with OIG to address spoofing and fraudulent Social Security schemes targeting our callers.
Additional Information

External Stakeholders

**Congress:** Congress maintains an interest in service delivery options for the public – the National 800 Number, face-to-face, and online services.

**The Public:** The public expects to have a positive customer experience when calling the National 800 Number. Existing customer feedback surveys continue to show that wait time is one of the biggest drivers of customer satisfaction.

**Labor Union Organization:** The American Federation of Government Employees represents our National 800 Number agents and provides input to leadership within the Office of Operations.

**Advocacy Groups:** These organizations advocate for the rights of people with disabilities, including advocating for secure and convenient service delivery options, such as improved National 800 Number services.