



## 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.<sup>1</sup>

- 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.

---

<sup>1</sup> 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 Systems Operations and 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 Q4

---

## **Overall APG Progress**

In FY 2020, we achieved our National 800 Number Average Speed of Answer (ASA) and Agent Busy Rate (ABR) targets. The ASA was 16.1 minutes, about a 20 percent improvement from FY 2019 performance of 20.4 minutes. We achieved an ABR of 7.4 percent, about a 48 percent improvement from FY 2019 performance of 14.1 percent.

The COVID-19 pandemic affected our service delivery and caused National 800 Number hiring delays. We acquired additional telework equipment to maximize 800 Number agents working remotely. We also operated on two telephone platforms simultaneously to accommodate caller demand for service. We resumed hiring in the third and fourth quarters. While the hiring delay resulted in delayed new hire training, we currently have more agents available to assist callers compared to the start of the fiscal year. Despite initial challenges related to securing telework equipment, we handled over 34 million calls, almost 1 million calls over FY 2019.<sup>2</sup>

Earlier this year we adjusted our 800 Number operating hours to 8:00 a.m. to 5:30 p.m. However, during the fourth quarter we expanded our hours to 8:00 a.m. to 7:00 p.m. to better accommodate our customers' needs. We also increased our marketing efforts to increase awareness of our service options during this pandemic, including displaying new signage on our local office doors and mailing letters to the public to advertise our phone and online services.

We continue to focus on improving our 800 Number services and continue to make technology advancements. We awarded a new contract for a modernized uniform communication platform (i.e., Next Generation Telephony Project) ahead of our fourth quarter milestone.

---

<sup>2</sup> FY 2020 results are through September 30, 2020, which is the end of the calendar month.

# Key Milestones

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

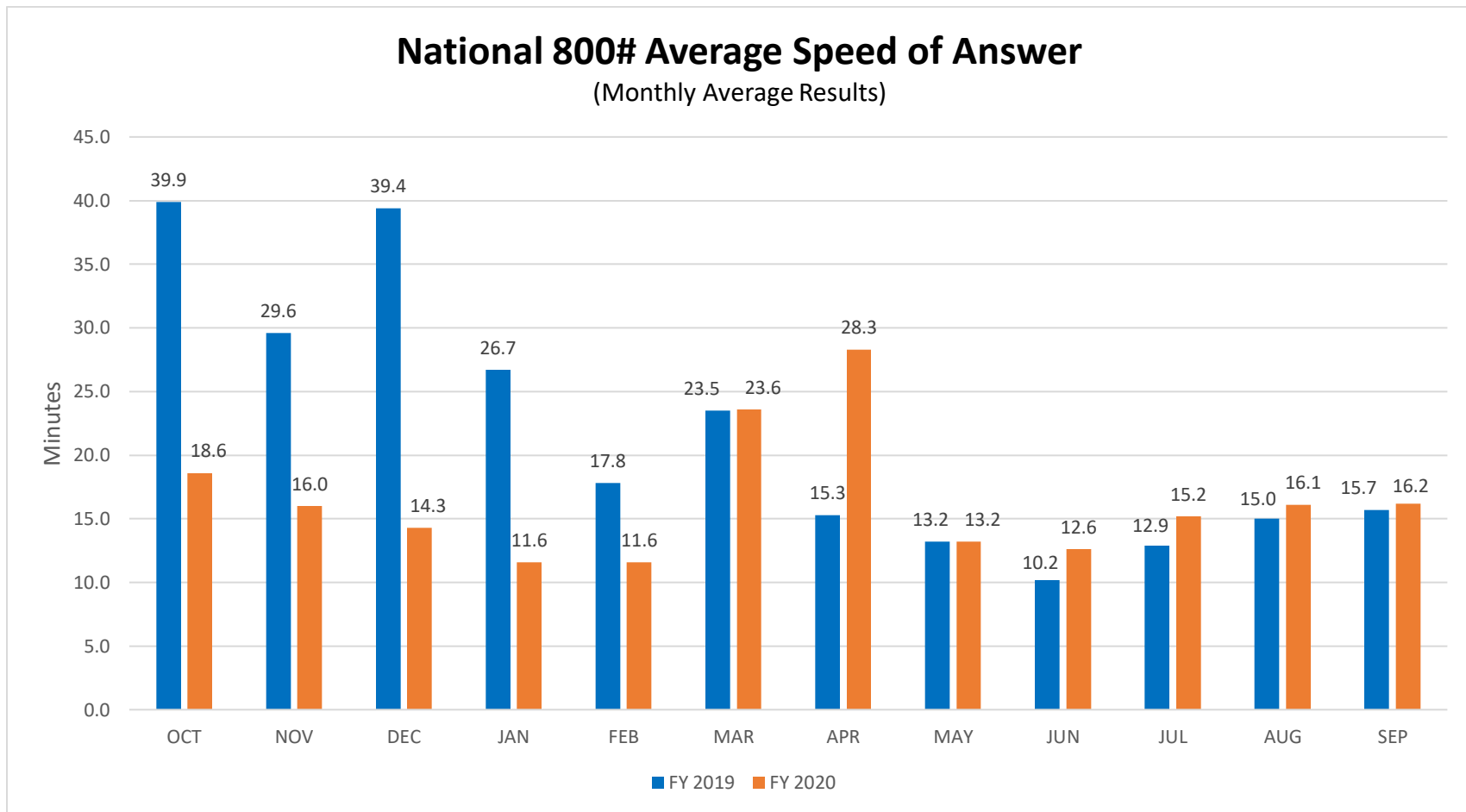
| Milestone Summary  |                    |                  |
|--|--------------------|------------------|
| Key Milestones   | Milestone Due Date | Milestone Status |
| <b>FY 2020</b>   |                    |                  |
| On-board 400 newly hired National 800 Number agents  | Q1           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



# Key Indicators

## **Primary Indicator:** Average Speed of Answer

- FY 2020 Target: 17 minutes
- FY 2020 Results: 16.1 minutes

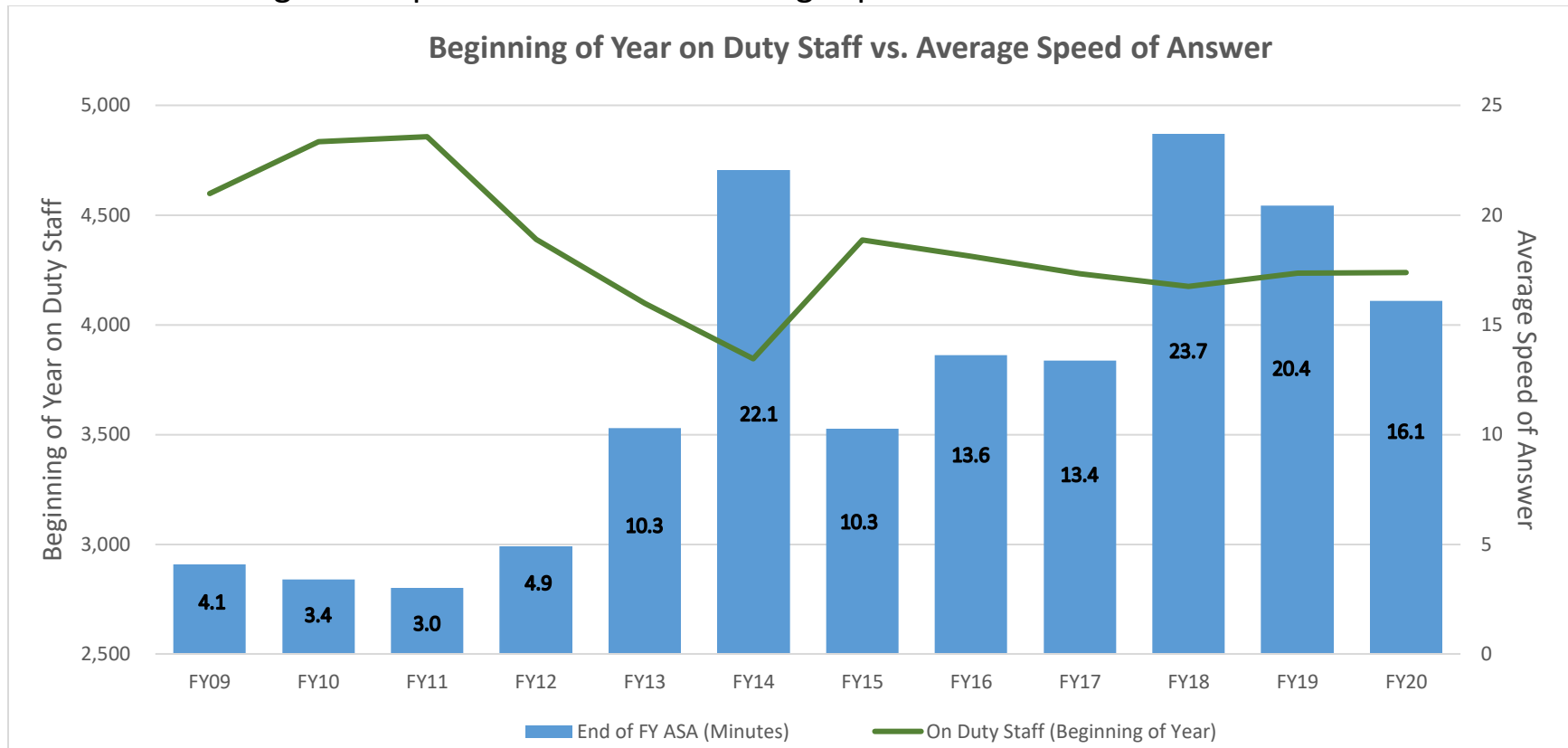


# Key Indicators

## Historical Data

Reduction in Average Speed of Answer<sup>3</sup>:

- 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.

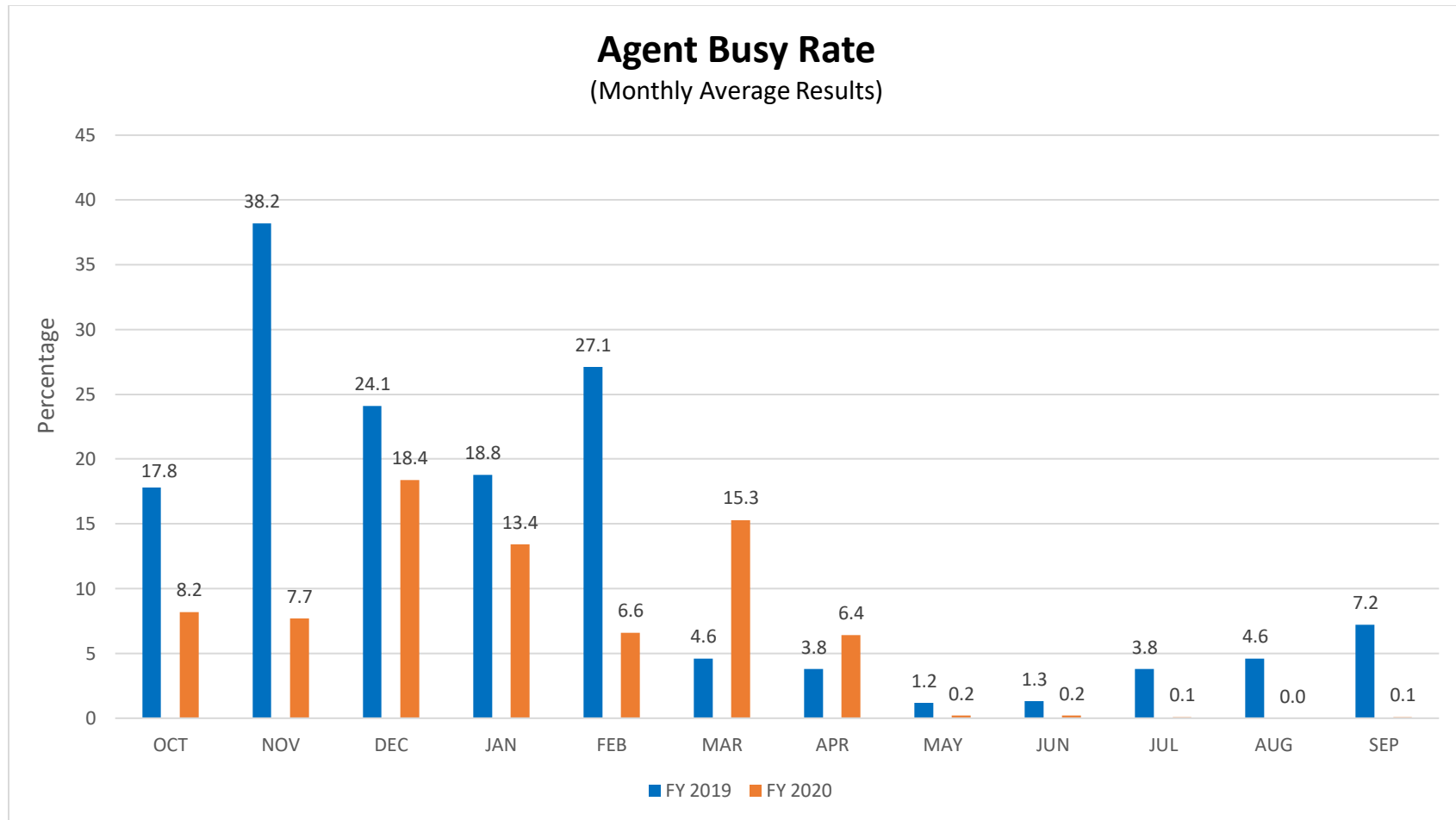


<sup>3</sup> This target is also a BWM and as such are estimates. BWM estimates are updated each year with the President’s Budget. The FY 2021 target will be finalized with the FY 2021 enacted appropriation.

# Key Indicators

## Secondary Indicator: Agent Busy Rate

- FY 2020 Target: 12 percent
- FY 2020 Results: 7.4 percent



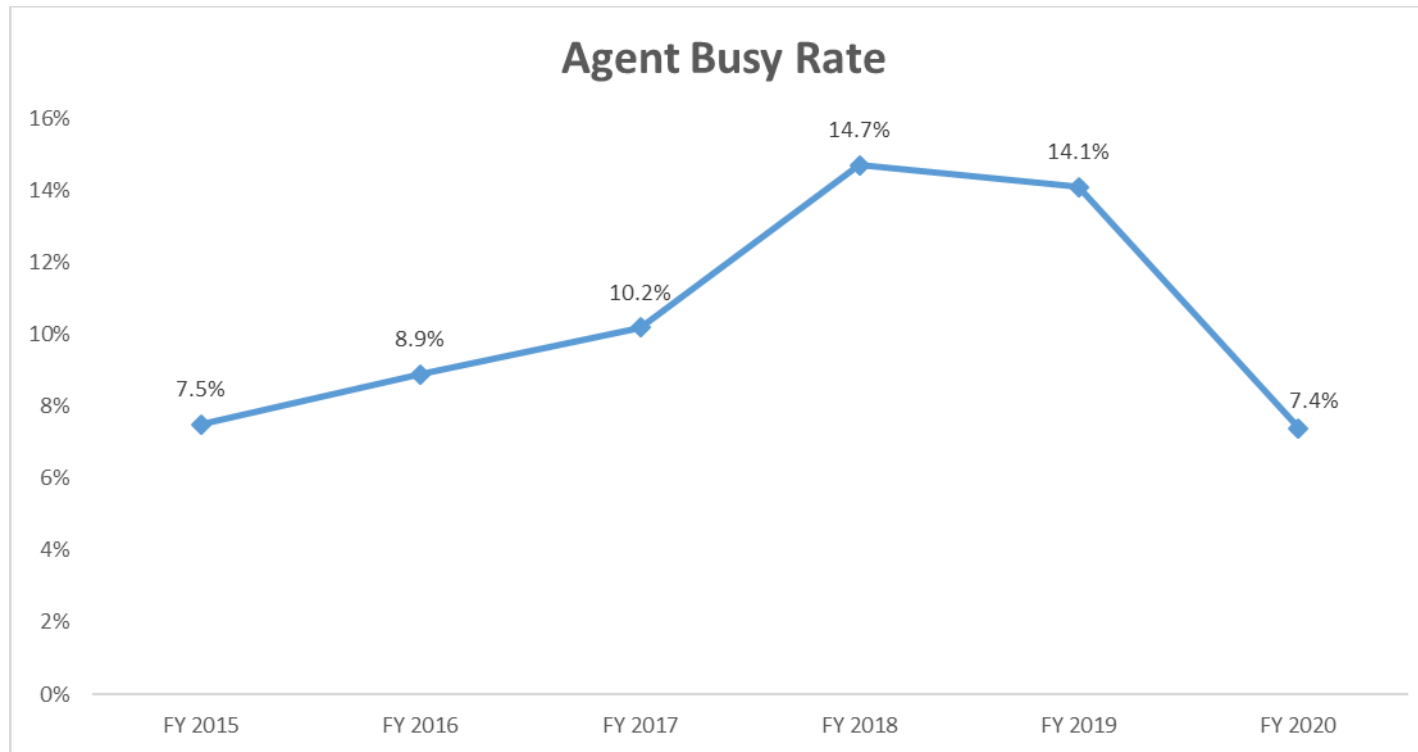
# Key Indicators

---

## Historical Data

Reduction in Agent Busy Rate<sup>4</sup>:

- 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.

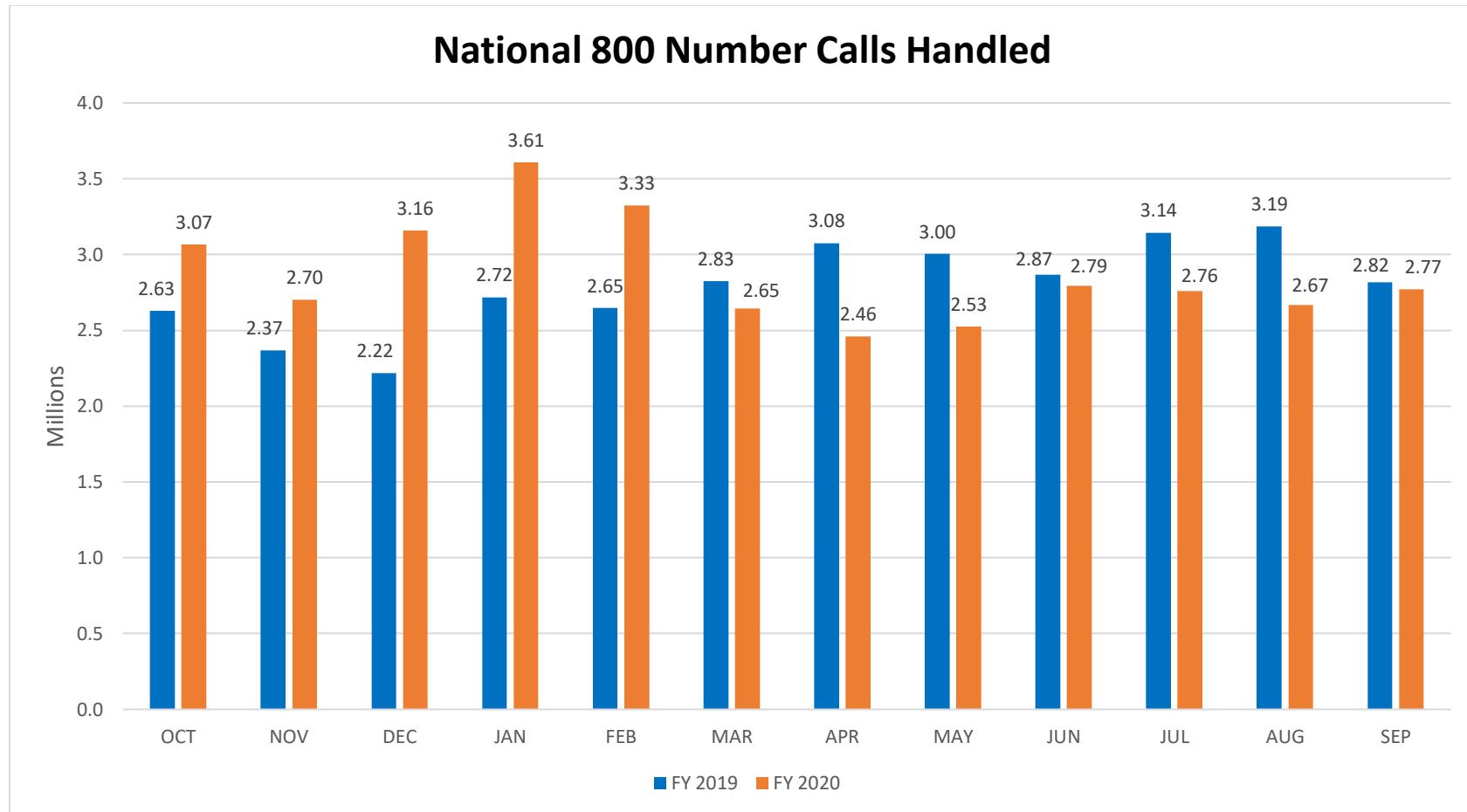


<sup>4</sup> This target is also a BWM and as such are estimates. BWM estimates are updated each year with the President's Budget. The FY 2021 target will be finalized with the FY 2021 enacted appropriation.

# Key Indicators

## Secondary Indicator: Calls Handled

- FY 2020 Target: 36 million
- FY 2020 Results: 34,480,132



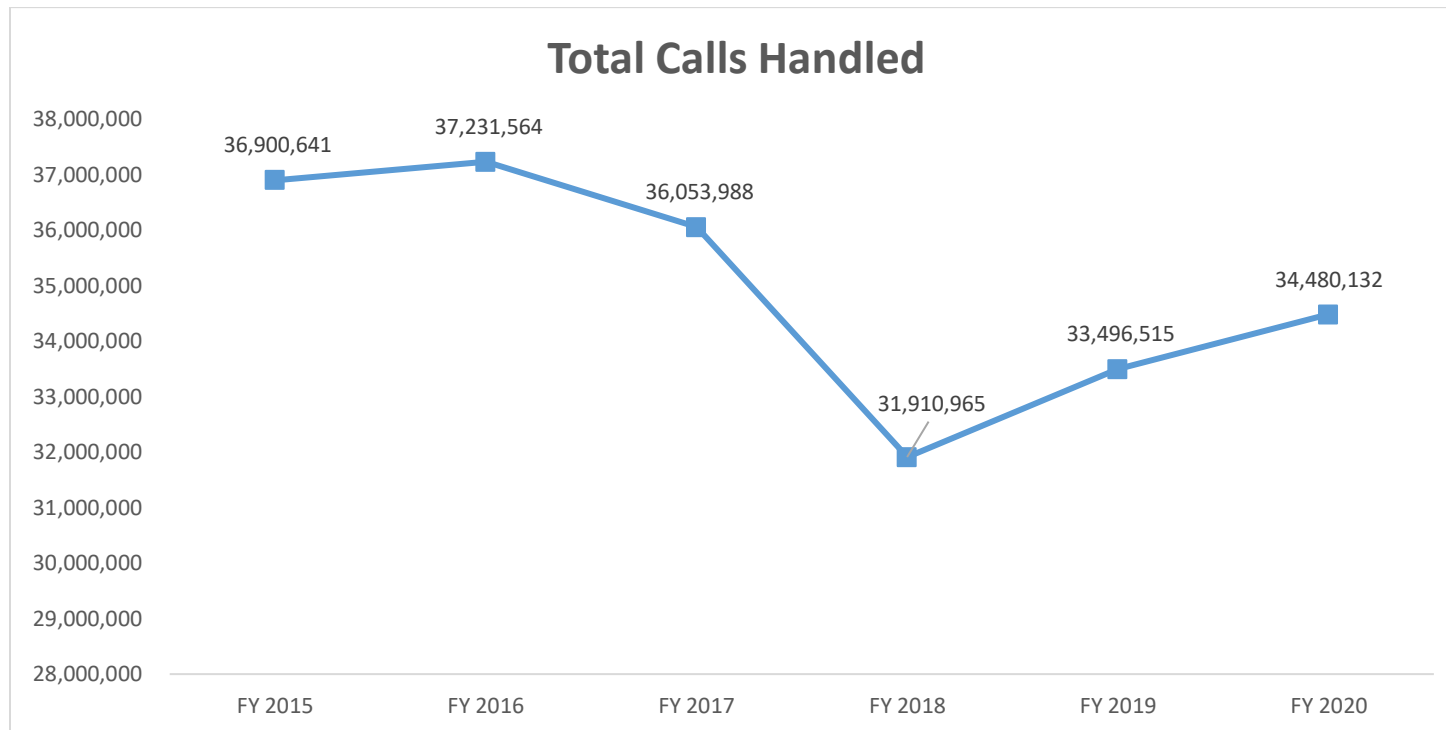
# Key Indicators

---

## Historical Data

Increase in Calls Handled<sup>5</sup>:

- 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.



---

<sup>5</sup> 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.

| Assumptions  |
|--|
| Availability of qualified candidates                       |
| Normal levels of agent attrition                           |
| Stable call volumes  |
| Adequate resources for hiring and technology modernization |

| Key Risks  | Mitigation  |
|--|---|
| Failure to resolve authentication challenges to enable IVR | 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). |
| High turnover/attrition/inadequate candidate pool          | With sufficient budgetary resources, we can replace our agent losses with qualified candidates.   |
| Delays in implementing NGTP                                | We created a program management office to track key milestones, and to ensure we stay on time and on budget, with the implementation of NGTP.   |
| Increase in spoofing                                       | We will continue to support efforts to identify scammers misusing our telephone services and take necessary appropriate actions.  |

# 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.