CENTRALIZED INBOUND AND OUTBOUND CONTACT CENTER SERVICE AS NEW STRATEGY IN DATA COLLECTION[1]

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Organization: Istat - Italian National Institute of Statistics

1. Introduction

The Italian Statistical Institute (Istat) recently has re-designed its organisational structure characterized by the centralisation of all the support services, including - among others - the new Division for data collection implementation from direct surveys (DCI). One of the objectives of the new Division is the centralization and standardization of the communication strategy with respondents, by creating an only responsibility center in Data collection (DC), thus increasing the efficiency of the activities run, standardizing processes and functions activated, removing duplications and overlapping, restructuring DC processes, transferring specialist knowledge among sectors. In this context, an already existing service of INbound Contact Center (CC) has been enhanced and extended to all the types of units involved in the surveys (enterprises, institutions, individuals) and reorganized in the flows, whereas a new service of OUTbound has been settled, both working in an integrated process. Those services have been outsourced.

2. General technical aspects

The overall functioning of the infrastructure is based on the definition and implementation of the following technical aspects:

• information flow among the different actors involved (enterprises, CC operators, DCI personnel);

• functionality of the sharing tools for the INbound service called shared agenda,

• default contact card (procedure) for the OUTbound service,

• characteristics of the materials to be produced by thematic sector,

• FAQs to be provided to the CC operators aimed at ensuring the uniformity of the unit treatment by using a set of harmonised answers in both services,

• content of the training to be run each time a survey has to be launched,

• strategies for calendars implementation of the activities to be run.

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In order to start-up both services, a specific training to CC operators has been provided on main functions of acquisition systems available, that are the back office of Business statistical Portal for enterprises and single specific acquisition system for other kind of unit. In the following presented cases, CAWI is the acquisition technique adopted.

3. INbound Contact Center service

In more details, the INbound service provides assistance and support to responding units in the access and navigation of the acquisition systems (i.e. Business statistical Portal for enterprises), as well as on the general rules that define the statistical activity and on the legal obligations for respondents. Finally, it provides answers to the most recurring questions about major instances of the survey's content. The assistance is guaranteed by synchronous (toll free number) and asynchronous channels (dedicated email address). Three are the levels of assistance identified, with increasing levels of specialization and complexity: first and second-level of assistance are devoted to solve the most recurring problems generally managed by CC operators by FAQs, while the third one is for assistance on the cases with the highest degree of complexity that implies recurring both to DCI non-thematic and thematic experts. For requests that are not solvable directly by the CC a tool - the *shared agenda* - presenting features useful for managing and sharing the received instances is used.

From January 2016 to May 2018, the INbound assistance managed around 251,000 service requests for a total of 20,000 hours of activity (see trend by channel and month in Graph 1). Between the two possible contact channels, the telephone is by far the one preferred by users, representing 75 percent of the activated contacts, the remaining quota being done by email.

Graph 1. Service request (SR) by channel and month – Period Jan2016-May2018
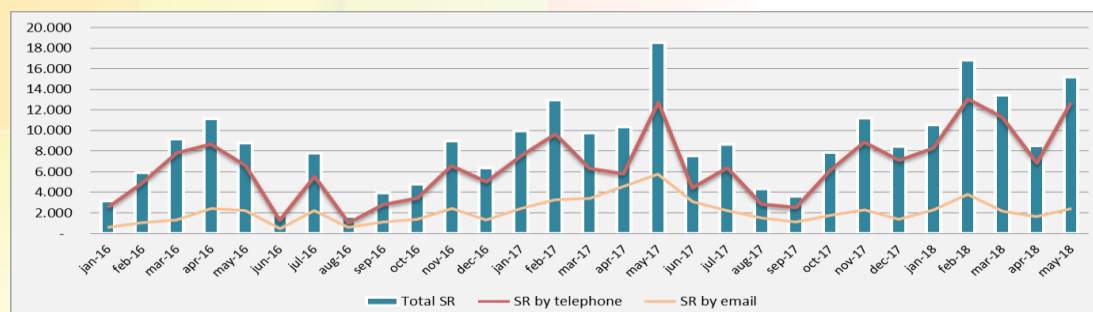
Referring to level of assistance, 90 percent of contacts are solved by CC operators (first and second level assistance), whereas the remaining - more complex - are managed by Istat expert personnel (third level), either working in the DCI division or in the thematic sector.

Referring to service efficiency, the quota of telephone calls answered is 75 percent of the total income plus a further 3 percent of calls back, while the remaining are lost for abandonment by users, before assistance can be provided.

4. OUTbound Contact Center service

Two different levels of assistance can be provided by the OUTbound CC: i) the "core service", being the most widely adopted, and ii) the "additional service", so far only adopted in the Quarterly Business Survey on Job Vacancies and Hours Worked (VELA) in order to support transition from CATI to CAWI technique.

The "core service" is realized contacting by telephone the unit's referent that for enterprises is stored in the Business statistical Portal and indicated by the unit itself. This service also provides assistance on access to data acquisition systems.

The "additional service" provided consist of: i) support in the compilation of the questionnaire and right interpretation of the questions; ii) realization of data entry in the on-line questionnaire, in case the contacted enterprise explicitly requests it; and iii) insertion of register changes, in the appropriate section of the Business statistical Portal.

In the case of the structural surveys, the contact is realized in a period of time before the closing of the survey only to the most relevant non-respondent units, while in the short-term surveys it is carried out for few days after the punctual deadline of the Data Collection and during the 'useful' period. The use of a customized contact form, based on the specificity of the survey, guarantees the uniformity of treatment of the units contacted. The amount of contacts attributed to each survey is related to two factors: sample number and response rates. The assignment takes place in a manner directly proportional to the first and inversely to the second. The list of contact units is provided by Istat, with daily updates. Where the information relating to referents is lacking or absent, it is supplemented by the CC company.

For the OUTbound service, from June 2017 till May 2018, the overall effectiveness (n. of compiled questionnaire over number of net available contacts) is calculated, and reaches 31 percent for the service as a whole; nevertheless splitting the values between structural (on enterprises or institutions) and short-term survey, it shows that is much higher in the first group (38) than in the second one (25).

In total, 43,580 contacts (of the 58,000 available per year by contract) have been invoiced, among these 59 percent was used for structural surveys recall, while the remaining for short-term surveys (see trend of OUTbound service and received questionnaires per month, Graph 2).

Graph 2. OUTbound service and compiled questionnaire by month – Period Jun2017-May2018
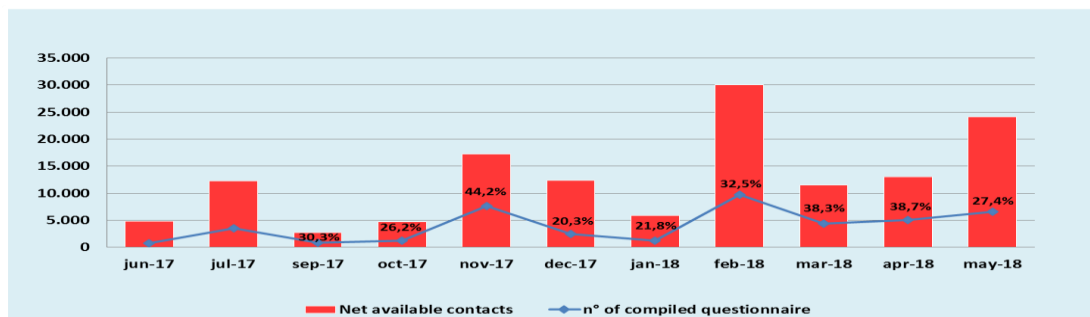
Data by survey are also analyzed referring to units subject to penalties or not and to the questionnaire arrival date.

Particularly, for VELA survey, significantly positive results emerged during the campaign moving from one quarter to the next one, as the activity run by the CC operators becomes more efficient (a relative higher number of contacts is established) and the percentage of returned questionnaires increases.

5. **Preliminary conclusions and future developments**

The centralization of CC services, jointly with other initiatives connected with Istat reorganization, allowed to maintain or increase both the response rate and data quality compared to the results obtained before the restructuring process, at the same time data collection length was maintained or reduced.

The challenges for the next future are: a) developing platforms for the acquisition of data from survey units belonging to different sectors; b) implementing the Integrated Survey management system; c) generalizing the service: increased integration between INbound and OUTbound services; d) rationalizing tendering procedures for the acquisition of the service: reduction of unit costs; e) correct dimensioning of the service in an evolving DC panorama.

6. **References**

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