



INSTITUTO NACIONAL DE ESTATÍSTICA  
STATISTICS PORTUGAL



# **FIFTH INTERNATIONAL WORKSHOP ON BUSINESS DATA COLLECTION METHODOLOGY**

**19-21 SEPTEMBER 2018 – STATISTICS PORTUGAL, LISBON**





# CENTRALIZED INBOUND AND OUTBOUND CONTACT CENTER SERVICE AS NEW STRATEGY IN DATA COLLECTION

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## SUMMARY

- I. Data collection and Contact Center service centralization
- II. INbound and OUTbound service organization and tools adopted
- III. Preliminary results and service data analysis
- IV. Future challenges



# I. Data collection and Contact Center service centralization



## New setup: Data collection as cross-sectional service

Social statistics  
and population  
census Sector

Businesses and  
Institutions  
Sector

Environment and  
territory Sector

Direct data collection

Methods and information technologies

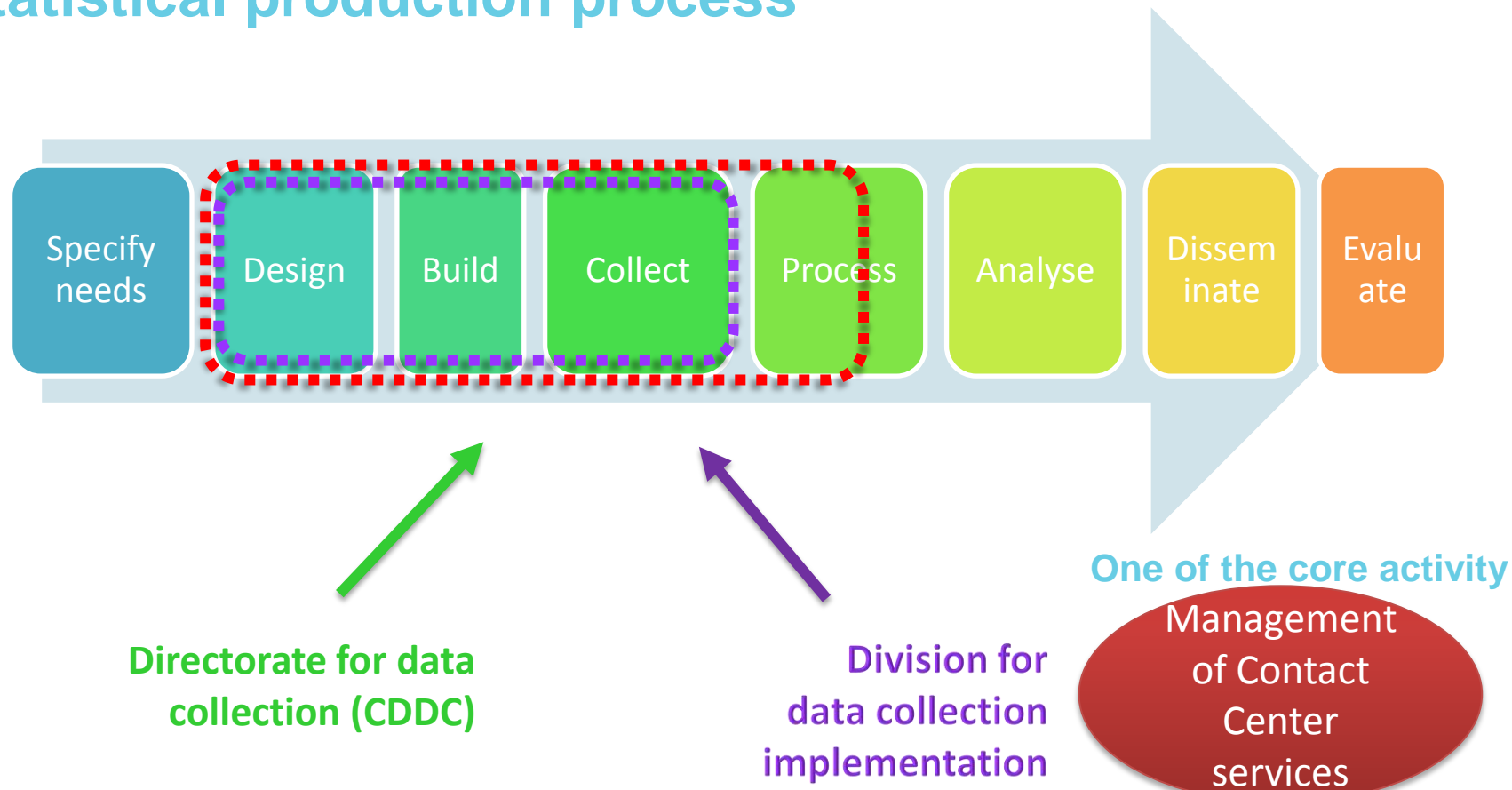


## Data collection (DC) centralisation

- ✓ **Only responsibility** centre for DC
- ✓ Establishing a **specialist centre for the DC**
- ✓ Transfer of **specialist knowledge of DC** between sectors
- ✓ **Increase the efficiency** of the activities carried out
  - **Standardization** of activated processes and functions
  - **Deleting duplications and overlays** in functions
  - **Restructuring** of the DC processes
- ✓ **Revisit capacities, resources used, workflows**



## Statistical production process



Directorate for data  
collection (CDDC)

Division for  
data collection  
implementation

One of the core activity  
Management  
of Contact  
Center  
services

Mapping of CDDC activities within the framework of the international reference conceptual schema GSBPM

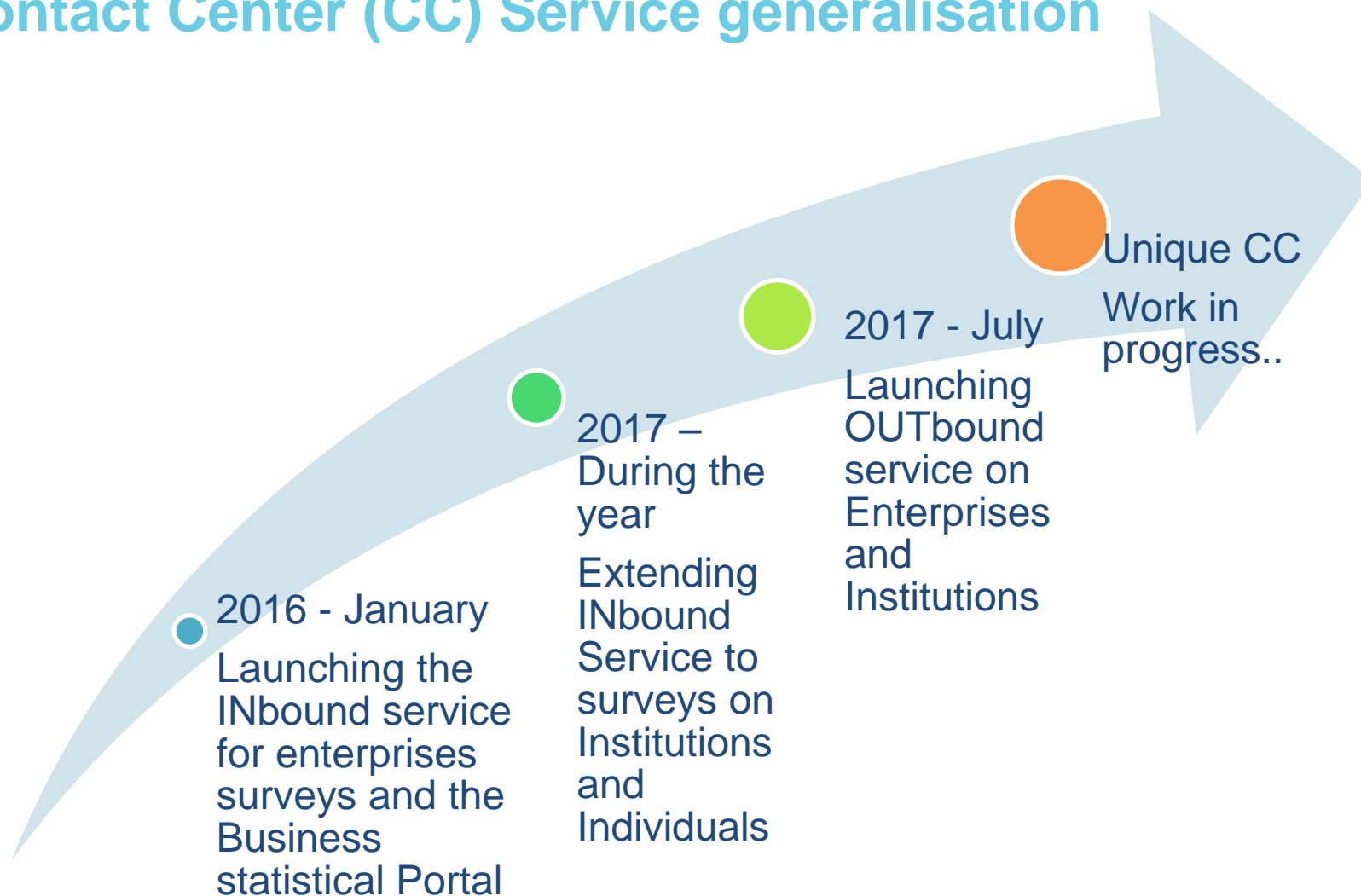
Source: Delibera D16 49 DIRM2017

Generic Statistical Business Process Model – GSBPM

(<http://www1.unece.org/stat/platform/display/metis/The+Generic+Statistical+Business+Process+Model>)



## Contact Center (CC) Service generalisation







## II. INbound and OUTbound service organization and tools adopted



## INbound – OUTbound - Service objectives

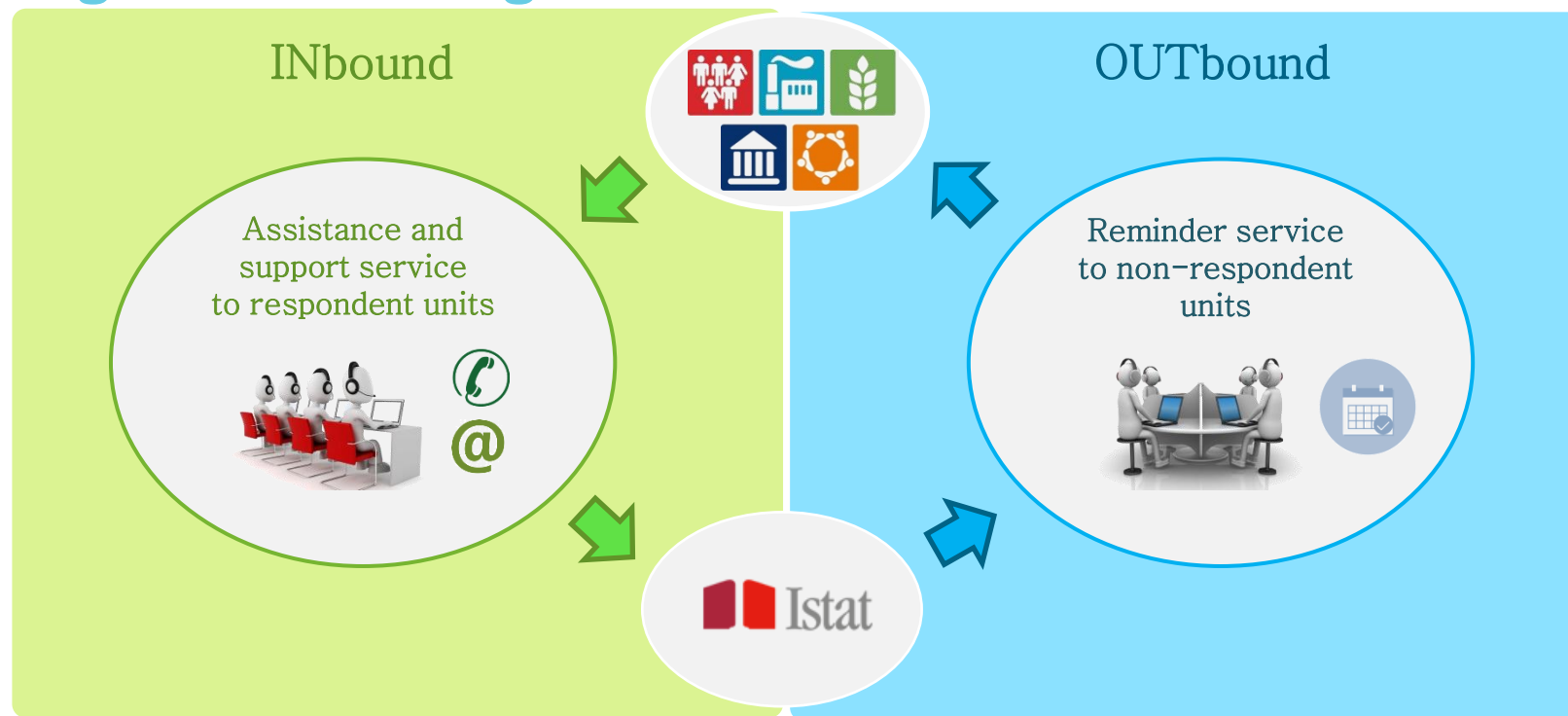
### GENERAL

- Providing assistance and support to respondent units
- Standardize data collection processes by adopting a single model for all surveys
- Improve the quality of the data collected, mainly in terms of completeness and timeliness

### Specifically for OUTBound

- Improve response rates (managing reminds as «core service» and the direct data entry as «additional service»)
- Confirm/Update the register information of the survey units and the data of the company contacts that populate the acquisition systems of the Institute (statistical portal, Gino...)

## INbound – OUTbound management: Integrated working flow



- The two services operate as an **integrated management system**:
- operators with similar skills and experience
  - same knowledge system (FAQs) to support sample units
  - comparable training sessions
  - use of standard procedures to manage the sample units

# INbound – OUTbound management: The players

## Sample units



Enterprises,  
Institutions and  
Individuals  
involved in  
statistical  
surveys

## Contact Center INbound Operators



- provide assistance and support to respondent units in fulfilment of statistic requirements (Single contact point)
- manage and solve the most recurring issues
- transmit the complex and specific requests to Istat experts (by the tool *Agenda Condivisa*)

## Contact Center OUTbound Operators



- contact the non-respondent units to remind survey's deadline
- provide assistance and support in fulfilment of statistic requirements, whether required
- redirect the contacted unit to Inbound Service for any complex non-thematic and non-recurring thematic request

## Istat

Data Collection and  
Statistical Production  
Directorates



- solve Inbound complex non-thematic and non-recurring thematic cases (by the tool *Agenda Condivisa*)



## **INbound – OUTbound management: Istat internal functions**



### **Data Collection Directorate**

- standardisation of operational procedures
- define activity schedule
- production and update of non-thematic subject matter
- training to operator on non-thematic matter
- monitoring the service
- management of complex non-thematic service requests (SR)



### **Production Directorates**

- production of thematic subject matter
- training to operator on specific survey matter
- management of non-recurring thematic service requests (SR)



## INbound (IB) – OUTbound (OB) management: Main activities

### PRELIMINARY PHASE

- Production/update of survey information and thematic FAQ (Production Directorates)
- Non-thematic FAQ update (DC)
- Training operators (Production and DC Directorates)
- IB - Creation of thematic areas and log-in credentials to access the shared Agenda (DC, Contact Center - CC)
- OB – Define list size by survey, based on sample size and response rates analysis
- OB - List creation and integration with variables
- OB - Updating Contacts script

### CARRYING OUT PHASE

- Supervision and monitoring of the service (DC)
- Eventual training on the job (DC and Production Directorates)
- IB - Third-level non-thematic ticket processing (DC)
- IB – Third-level thematic ticket processing (Production Directorates)
- OB – Daily update of the non respondents list (DC)
- OB – Daily report Delivery (CC)



## INbound – OUTbound tools to solve users request: Survey characteristics

Survey characteristics	
NATIONAL AND INTERNATIONAL REGULATION	List of main legislative acts
SURVEY NAME	Complete name arising from legislative act
REFERENCE PERIOD	Month / Quarterly / Year /
SAMPLE TYPE	Census/Sample
SAMPLE SIZE	Number of units included
SURVEYED VARIABLES	Main issues
OBLIGATION TO ANSWER	YES/NO
SUBJECT TO PENALTIES	YES/NO
DEADLINE FOR DATA COLLECTION	DAY/MONTH/YEAR
SURVEY PRODUCTION RESPONSIBLE	Name Surname (direct telephone)
CONTACT MAIL	Survey ordinary contact mail



# INbound – OUTbound tools to solve users request: FAQ - Main categories

## non-thematic

*Cross-cutting requests regarding:*

- access and usage of data acquisition system
- information on legislation, obligation to answer and penalties
- general information about survey (deadline, involved units, data collection method, ...)

## recurring thematic

*Requests on specific survey issues:*

- main questionnaire topics and methodology
- insolvency proceedings
- register information changes





## **INbound – OUTbound tools to manage data acquisition**

### **Business statistical Portal - Back office**

The back-office of the Business Statistical Portal is the tool used by contact center operators to provide first-level assistance to survey respondents regarding:

- registration and access to the system
- resetting of original password for login
- insertion of requests for updating business master data in the appropriate section of the Business statistical Portal (business name, address, type of company, NACE activity, etc.)
- deadline for data transmission and information on state of fulfillment for each specific survey



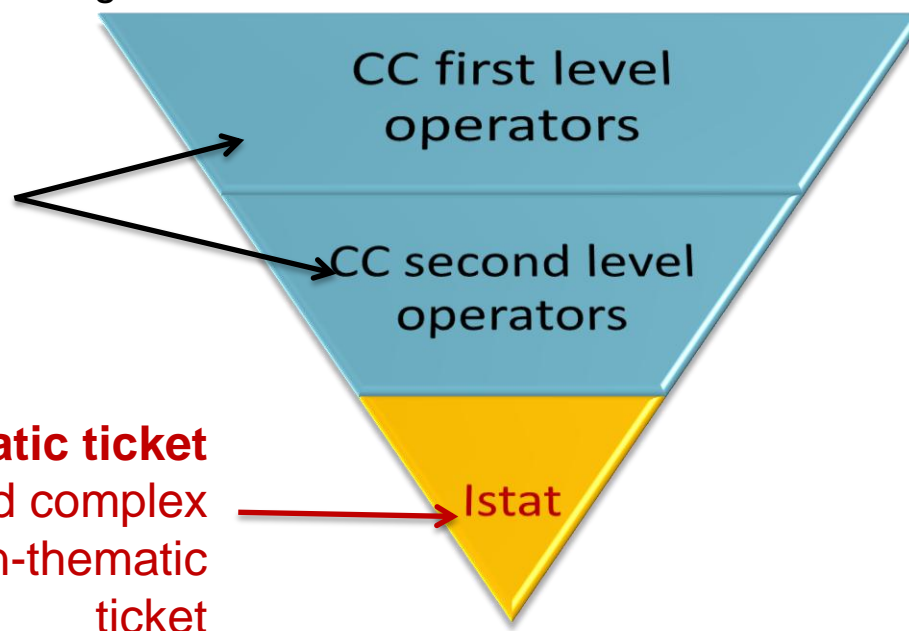
# Focus INbound : 1/2

## Trouble ticket system – Tickets management

Each Inbound Service Requests presented by telephone or email and classified according to FAQ categories, creates a ticket.

Responsibility in ticket solving:

**Non-thematic  
ticket**  
and recurring  
thematic ticket



**Thematic ticket**  
and complex  
non-thematic  
ticket



## Focus INbound : 2/2

### Trouble ticket system – *Agenda Condivisa*

Contact Center operators transmit not solvable tickets to Istat experts by the *Agenda Condivisa* tool



The *Agenda Condivisa*:

- **includes all relevant informations** to allow Istat experts managing the Service Request, that is:
  - respondent units data (unit code, name and contact informations of user who contacted Inbound service, ...)
  - request matter (short description)
- **provides all the functionalities to allow managing ticket** by Contact Center operators and Istat experts



## Focus OUTbound : Contact script

1/3

- Standard form, customized according to metadata on survey characteristics
- Guiding the operator in the contact management of the not responding unit, defining the flow
  - for the verification of the company contact and for the delivery of the reminder determined by the characteristics of the unit
  - for assistance in case a specific request arise from the non-respondent
- Defines the encoding of contact results (Provisional and definitive)



## Focus OUTbound : Lists and sample units contacts

2/3

Statistical  
production

- **Provide** a list of the units to be contacted balanced according to the following criteria:
  - influential units
  - units subject to penalties
  - long term non-respondent units
  - presence or not of at least one contact (telephone number or name of a delegate to the compilation)

Data  
Collection

- **Integrate** the list with the information useful for the customization of the script:
  - registry unit variables
  - date and protocol number of the survey information and / or communication with the of the information for the login to the data acquisition system
  - contact person of the survey unit (eg delegates and administrators of the portal)
  - penalty units

CC  
OUTbound

- **Integrate** the list with missing contact information
- **Upload** the list into the software



## Focus OUTbound : The additional service

3/3

It's used in order to support Quarterly Business Survey on Job Vacancies and Hours Worked (VELA) respondents in the transition phase from CATI to CAWI surveying technique

In addition to the “core service”, the following services are provided:

- support respondents in the compilation of the questionnaire and right interpretation of the questions
- direct realization of data entry in the on-line questionnaire, if explicitly required by the contacted enterprise
- direct insertion of register changes, in the appropriate section of the Business statistical Portal



## III. Preliminary results and service data analysis



## Preliminary results: increase of response rate and decrease in length of DC

### Structural Business surveys

Average response rate + 11 percentage points

Average length of data collection -37.2 solar days (*d*)

### Short-term surveys

(three representative surveys)

Average response rate + 20 percentage points

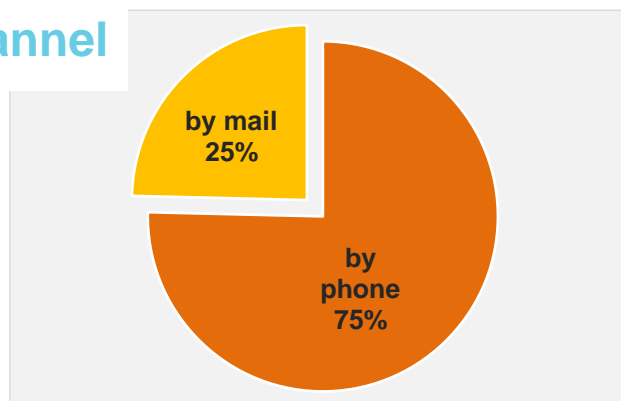




## INbound service:

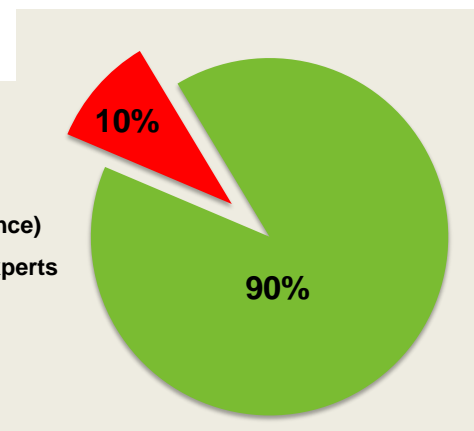
### by channel

250.000  
total SR



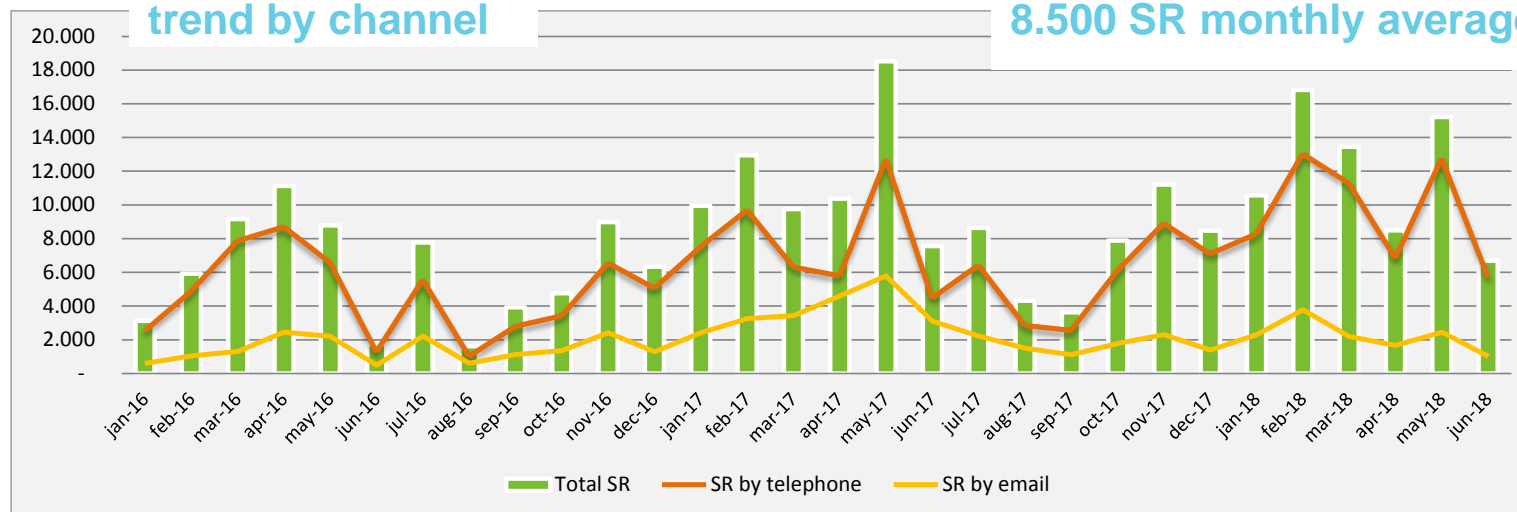
### by level of assistance

- SR solved by CC operators (first and second level assistance)
- SR solved by Istat experts (third level)



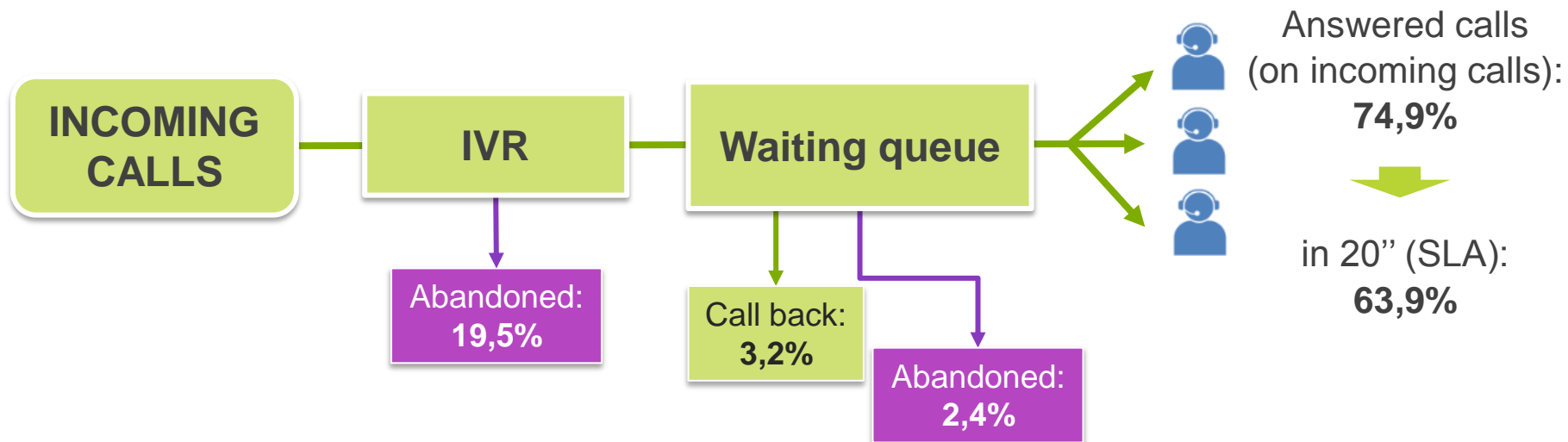
### trend by channel

8.500 SR monthly average





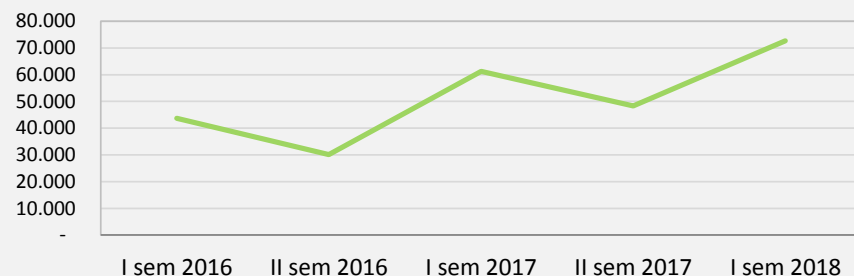
## INbound service: overall efficiency



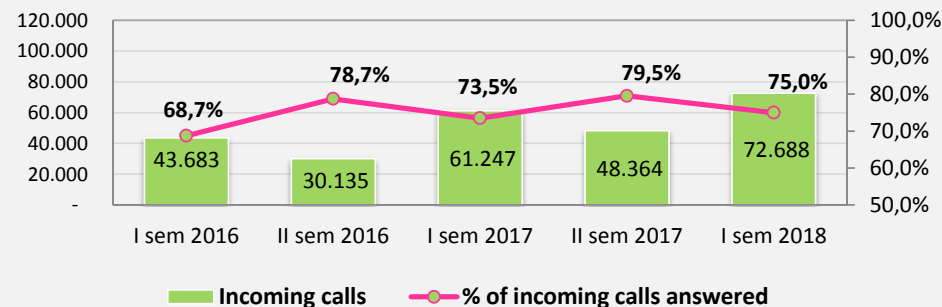


## INbound service: efficiency trend:

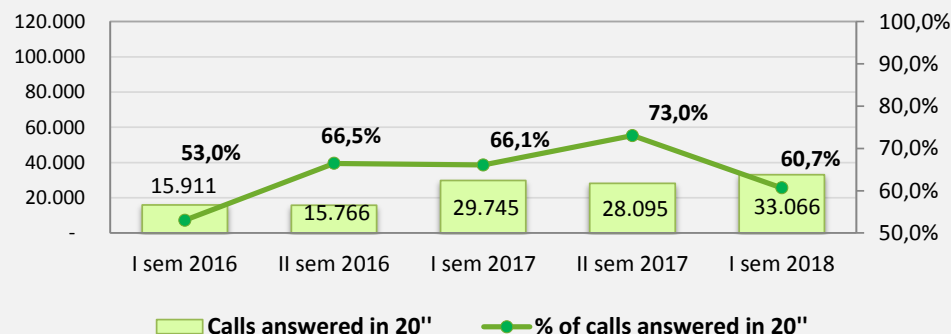
Incoming calls



Incoming and  
answered calls



Calls Answered in 20"  
(Service Level Agreement)

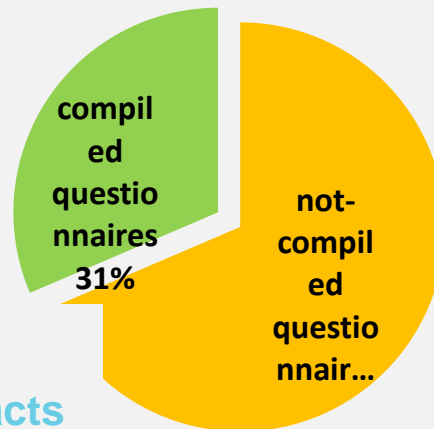




## Outbound service: effectiveness

Overall  
dimension

138,613 net  
available contacts

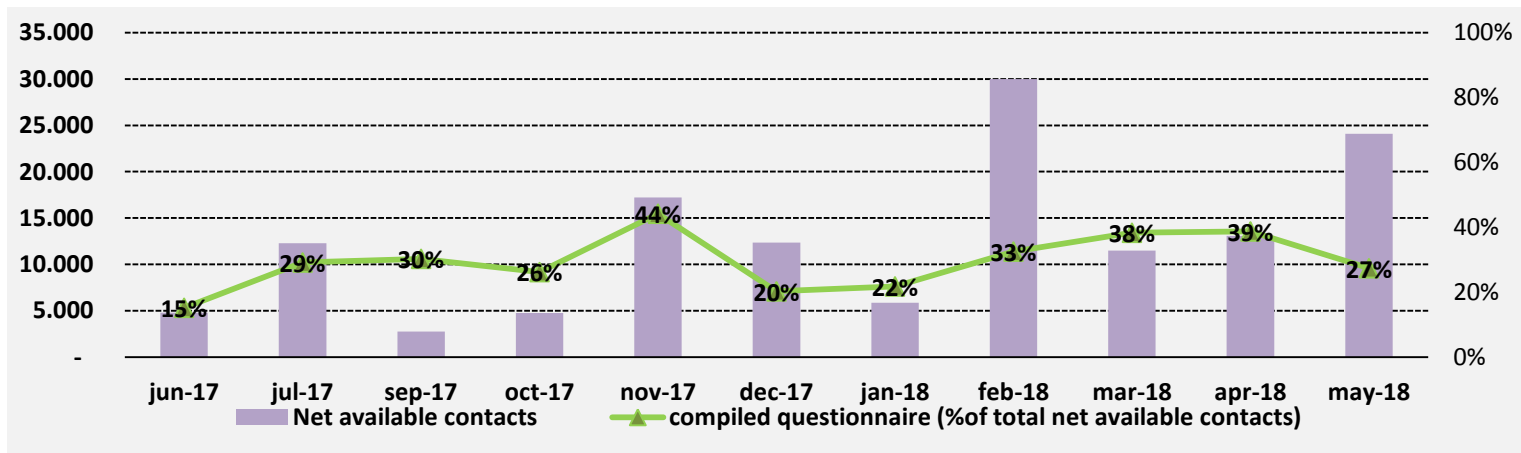


43,580 paid  
contacts

SHORT  
TERM  
41%

STRUCT  
URAL  
59%

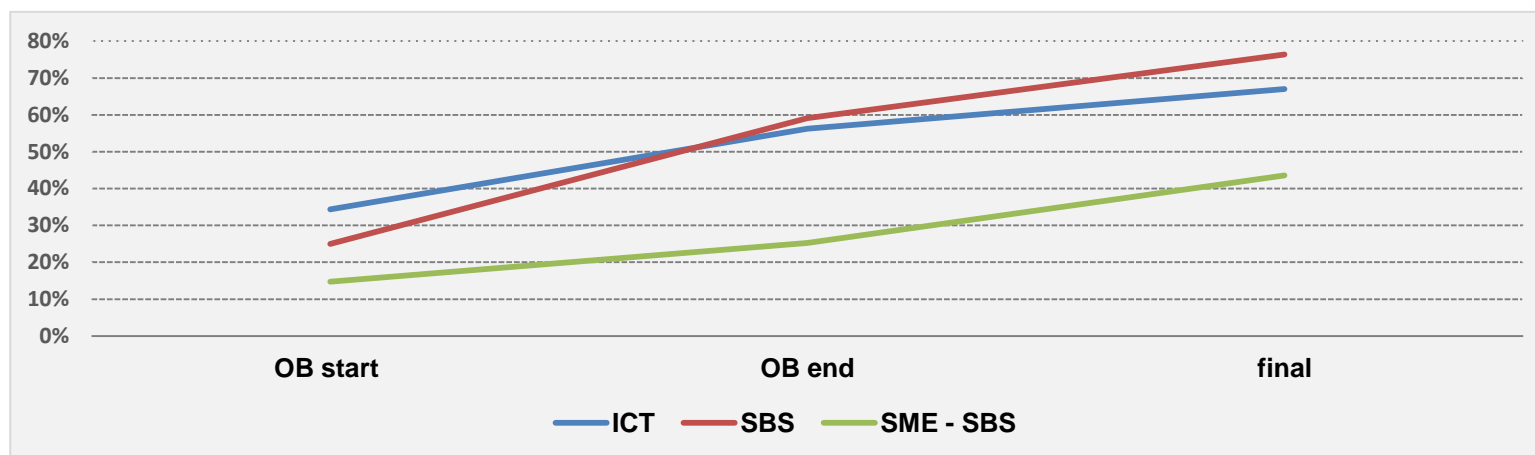
Trend



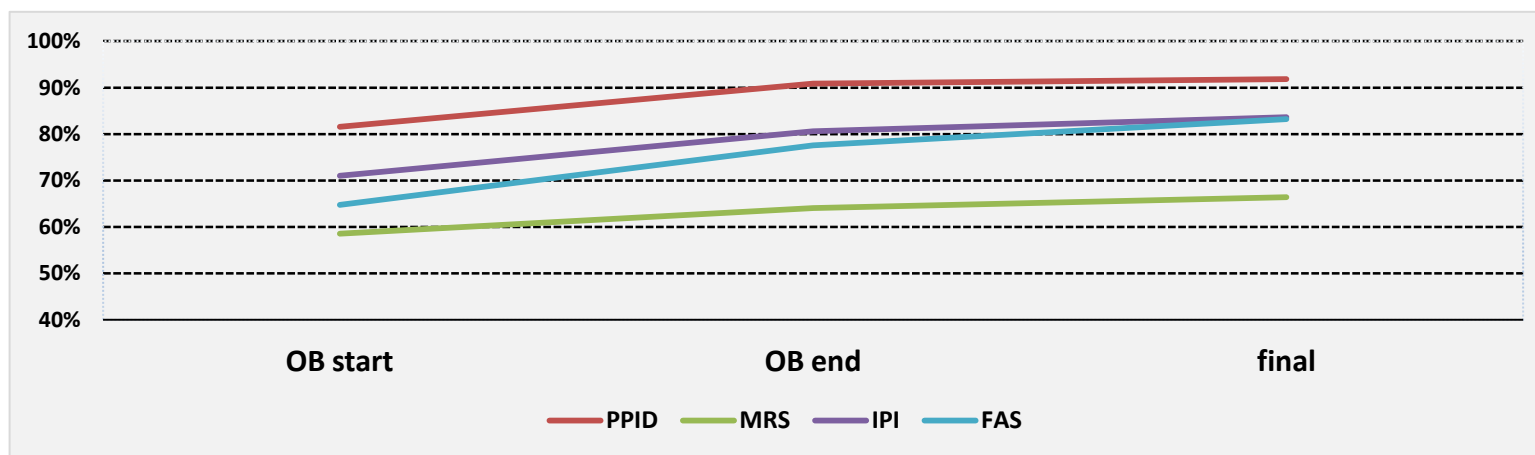


## OUTbound service: response rate trend by survey

STRUCTURAL



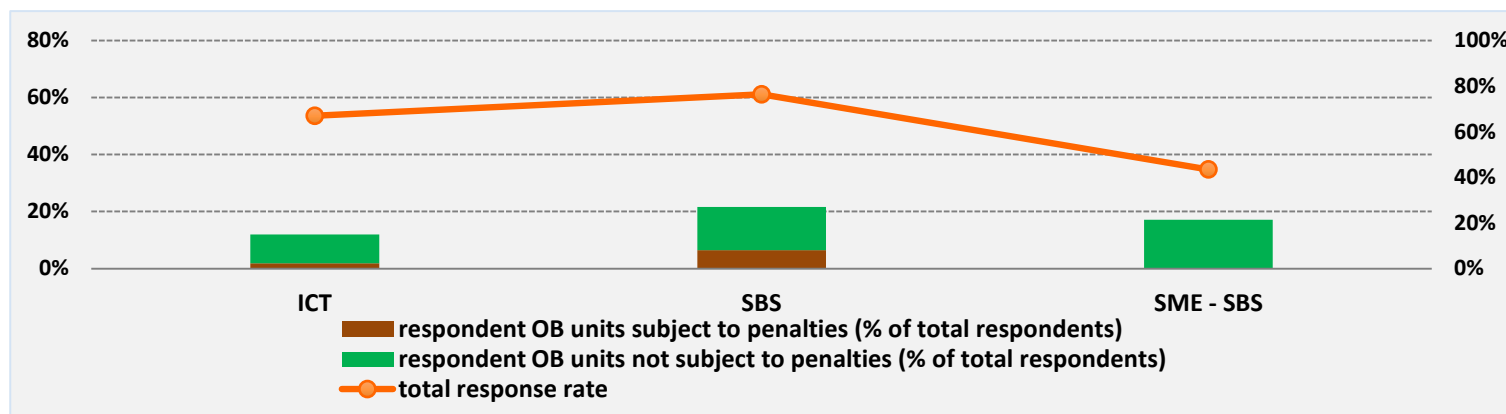
SHORT-TERM



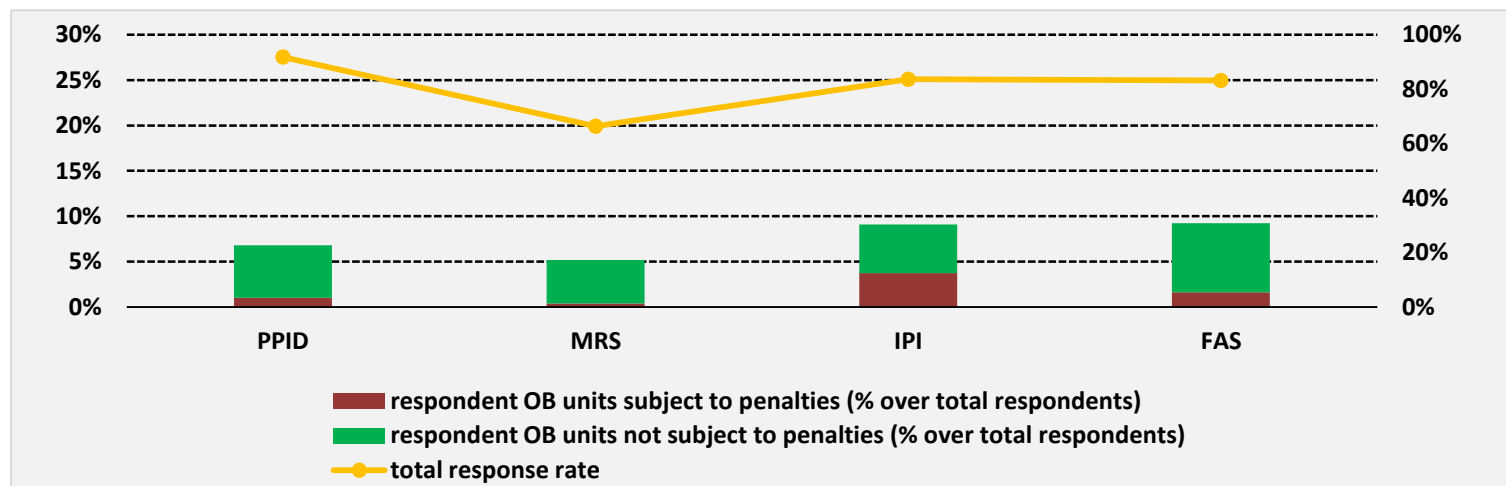


# Outbound service: contribution to overall response rate by survey

STRUCTURAL



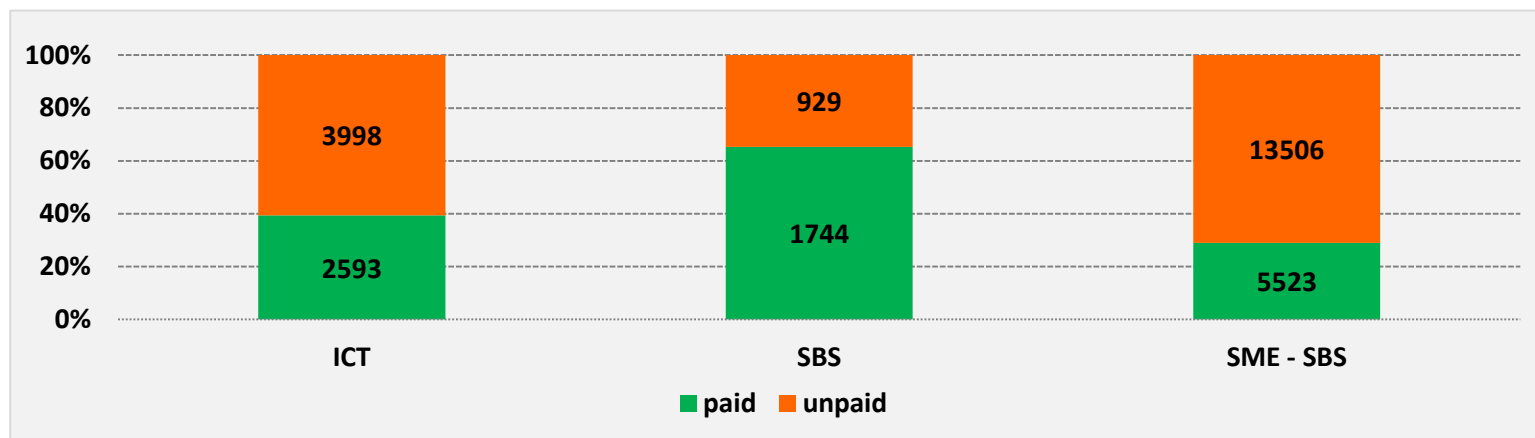
SHORT-TERM



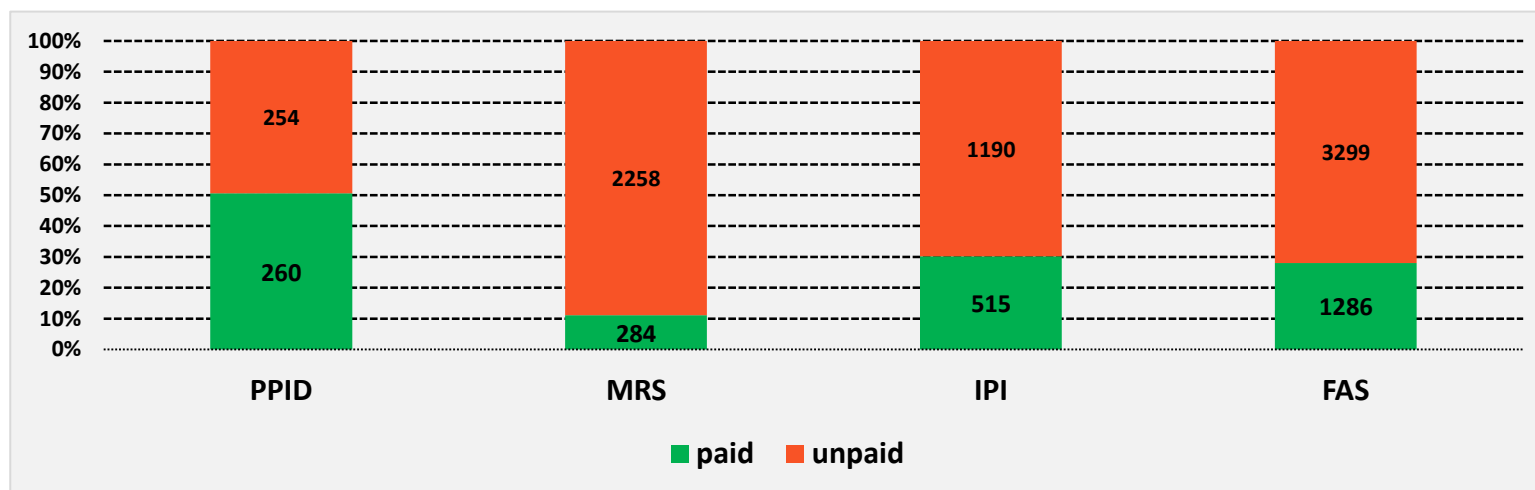


## Outbound service: effectiveness by survey (OB respondents)

STRUCTURAL



SHORT-TERM





## Future challenges

- ✓ Use of management and acquisition systems increasingly **standardized and homogeneous** in the type of functions made available
- ✓ Generalization of the service: **greater integration between INbound and OUTbound services**
- ✓ **Progressive inclusions of all survey** under a single CC service
- ✓ **Rationalization of tendering procedures** for the acquisition of the service: reduction of costs per unit





Thank you for paying attention!



## Main issues to be discussed

### ■ Inbound

How to adapt the service to specific features of different target populations (households, individuals, enterprises and institutions)?

### ■ Outbound

How to deal with units included in more than one survey simultaneously