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Good Practices in Social Security

Good practice in operation since: 2017

The Customer First: The customer service policy at ZUS

Social Insurance Institution
Poland

Summary

For the first time in the history of the Social Insurance Institution (Zakład Ubezpieczeń Społecznych – ZUS), a comprehensive action plan on customer service was prepared, namely, the “Customer service policy at the Social Insurance Institution for 2017–2020”.

The policy specifies strategic directions and operational goals, whose achievement will increase professionalism in customer service, improve the quality of services, and influence the development of forms of contact that are tailored to customer needs. The policy also includes a comprehensive summary of the current ZUS operations in customer service. Information and data on the methods of providing services to ZUS customers and customer ratings of ZUS have been gathered in one place. Areas that require development, optimization or improvement have been diagnosed.

Customer service policy is extremely important to enable a conscious and responsible management of the quality of services provided to ZUS customers.

The policy was adopted by the ZUS Management Board on 22 March 2017. The first summary of activities planned under the policy took place in June 2018. The report presented to the Management Board contained a summary of the policy objectives implementation as at 31 May 2018.

The issue or challenge

What was the issue or challenge addressed by your good practice? Please provide a short description.

ZUS activities for its customers have been carried out primarily in the framework of the objectives set out in the ZUS strategy. However, taking into account the number and quality of changes taking place in the area of customer service and growing expectations as to the manner of providing services in public institutions, it became necessary to define a specific, long-term action plan in this area.

Addressing the challenge

What were the main objectives of the plan or strategy to resolve the issue or challenge? List and briefly describe the main elements of the plan or strategy, focusing especially on their innovative feature(s) and expected or intended effects.

The objective of the Customer Service Policy at the Social Insurance Institution for 2017–2020 is to present the direction of changes planned for the coming years in the approach to customer service and the manner of achieving the objectives set in this respect.

The Customer Service Policy at the Social Insurance Institution for 2017–2020 is an extension of the Social Insurance Institution Strategy for 2016–2020 in the area of customer service. The starting point for determining the perspective of customer service in ZUS for 2017–2020 was ZUS own experience, including an analysis of customer expectations and observations of direct

customer service staff as well as observation of the latest trends in customer service, social trends and changes in public administration.

The vision of customer service in the Social Insurance Institution, defined in the policy, assumes efficient, innovative and widely available services for ZUS customers, tailored to their needs. This means that the customer and his/her satisfaction with the method of providing ZUS services is the most important for ZUS, regardless of the contact channel chosen by the customer. This approach requires the strengthening of activities aimed at increasing the professionalism of customer service and the quality of services. It is assumed in the policy that the implementation of the aforementioned vision requires changes and improvements on many levels. The basic orientation is to develop e-services. Telephone and personal services optimization is equally important to enable a comprehensive approach to ZUS services.

The strategic orientations indicated in the policy are the following:

- a service approach to the customer;
- a new approach to services design – based on customer experience analysis;
- customer segmentation – a more personalized approach to customers classification;
- a new model of business and customer service cooperation;
- changes in the organization of customer service.

The objectives of the ZUS strategy have been supplemented in the policy by nine operational objectives:

- improve the quality of information;
- increase the number of matters settled during one customer's visit/contact;
- improve the timeliness of handling customer cases and informing them of the progress of the case;
- optimize multichannel services;
- improve services tailored to customer needs (service time and conditions meeting customer expectations);
- reduce the cost of customers' contact with ZUS;
- provide customers with intuitive, easy-to-use and functional tools;
- increase data interoperability and use of information held by ZUS;
- provide comprehensive and professional customer care at every stage of case handling.

Twenty-four initiatives have been identified to support the implementation of these objectives. Initiatives have been prioritized with “quick wins” being identified. Time frames have been also set for the planned initiatives and the impact of the environment on their implementation has been determined.

Targets to be achieved

What were the quantitative and/or qualitative targets or key performance indicators that were set for the plan or strategy? Please describe briefly.

The degree of attaining the operational objectives set out in the policy is monitored using 16 measures. These measures allow for checking whether the expected trend is achieved as a result of implemented activities.

For example, the following measures have been defined for the objective “Improving the quality of information”:

- percentage of persons assessing positively the quality of information obtained in the customer service hall;
- percentage of persons assessing positively the usefulness of the information obtained at the Telephone Services Centre;
- percentage of persons assessing positively the usefulness of information on the website;
- percentage of persons assessing positively the usefulness of information in information materials.

In each of these measures, an upward trend would be a desirable trend. For each measure, the base value has been determined.

Evaluating the results

Has there been an evaluation of the good practice? Please provide data on the impact and outcomes of the good practice by comparing targets vs actual performance, before-and-after indicators, and/or other types of statistics or measurements.

The first summary of actions planned under the policy took place in June 2018. The report presented to the Management Board contained a summary of the policy objectives implementation as at 31 May 2018.

The report presented a detailed description of 24 actions taken as part of the implementation of the policy objectives. Some of them were related to key legislative projects implemented by ZUS, where the customer service was of utmost importance. A part of the actions was related to the implementation of initiatives planned in the policy.

After the first year of the Customer Service policy implementation, the level of its implementation was analysed by analysing the measures defined in the policy. Only the results for two out of 16 measures were not consistent with the previously adopted assumptions. As the reasons for this situation have been diagnosed, it is possible to undertake further optimization activities.

Lessons learned

Based on the organization’s experience, name up to three factors which you consider as indispensable to replicate this good practice. Name up to three risks that arose/could arise in implementing this good practice. Please explain these factors and/or risks briefly.

The ZUS experience shows that in this type of project, it is necessary to diagnose the current status of the area for which a policy will be developed. As a result, it is possible to identify elements requiring improvement or optimization and to define the necessary actions. This must be carried out with due observance of the latest trends in a given field of activity. This will allow for the innovative solutions to be introduced. It is important to precisely define the goals and the actions that lead to their achievement. It is important to disseminate the information contained in the policy in the organization and to communicate activities carried out and the progress achieved.