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Good Practices in Social Security

Good practice in operation since: 2012

Mystery Shopping research in the area of customer service

Certificate of Merit with Special Mention, ISSA Good Practice Award – Europe competition 2019

Social Insurance Institution
Poland

Summary

In 2012–2013, the Social Insurance Institution (Zakład Ubezpieczeń Społecznych – ZUS) commissioned a research to apply the Mystery Shopping method in the area of customer service. As a fully objective method to assess customer service, the research enabled ZUS to check whether applicable customer service standards were being observed. It also allowed ZUS to issue clear guidelines aimed at improving the quality of customer service. In addition, the research report provided strategic information to the ZUS Management Board. Thanks to the Mystery Shopping method, ZUS has filled knowledge gaps on customer needs acquired by means of customer satisfaction surveys. Currently – although on a smaller scale – Mystery Shopping surveys are carried out by ZUS through its Customer Service Department.

The issue or challenge

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

ZUS has developed customer service standards for all of its local units. The rules for organizing and visual standards of customer service halls and service stations were defined. In addition, the services have been adapted to the needs of people with disabilities through appropriate devices. ZUS has also defined the requirements for its customer service staff, the scope and method of staff training, as well as verification of their knowledge and skills. A catalogue of cases handled and services provided at customer service stations has been also defined.

Currently, customers are served in all ZUS units at the same hours, exclusively by employees with extensive knowledge, experience, appropriate predispositions and skills to deal with customer service and correspondence. By tailoring services to the needs of various groups of customers including people with disabilities, the cases are handled in accordance with applicable procedures and standards.

Customer service quality is effectively and comprehensively monitored.

The Mystery Shopping method is one way of monitoring the quality of customer service in terms of meeting customer service quality standards, standards for equipment, the visual standards of customer service halls as well as employee knowledge.

ZUS carried out its first such research in 2012–13 in three rounds, with each round every half-year. In all, there were 3,310 visits by a mystery shopper. The research was completed in December 2013.

The mystery shopper method was re-applied by ZUS in the implementation of its pension reform on the reduction of the retirement age. In September and October 2017, a mystery shopper visited 62 ZUS branches. Thus, we have checked the preparedness of ZUS units for increased customer traffic and for meeting the service standards, assuming that additional 330 thousand customers could arrive at ZUS. The conclusions from the conducted research enabled efficient customer service during the implementation of the reduction of the retirement age reform, with customer satisfaction measured at 98 per cent.

Since 2018 – although on a smaller scale – the Mystery Shopping research has been used by the Customer Service Department in select ZUS units. In 2018, the research was conducted in 20 ZUS facilities. Conclusions from the research are forwarded to the management of the ZUS

units that have been covered by the research in order to improve customer service in the relevant areas.

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 purpose of the research using the Mystery Shopping method is to assess the quality of customer service including staff competencies on service, the organization of customer service halls, and the working conditions in ZUS local units. The expected results include improved service quality for ZUS customers, increased customer satisfaction and services tailored to customer expectations. Specifically, the objectives are to:

- provide customers with professional customer service through employees with appropriate predispositions, extensive knowledge and skills based on defined recruitment rules, a system of uniform training, verified knowledge and skills, observance of a code of ethics and rules of conduct as well as the procedures for handling individual cases;
- provide customers with the same service conditions in all units through the modernization of buildings, uniform visual standards customer service halls (same location, marking positions and equipment);
- provide customers with modern solutions that improve workflow, waiting time, use of information, with self-service as an alternative self-service even after working hours of ZUS units;
- guarantee services to all customer groups including the elderly and disabled people by eliminating barriers (stairs, thresholds, narrow passageways, doors with door handles), providing sufficient parking spaces, enabling the use of support devices for the disabled, and staff who are knowledgeable on customer service techniques including the ability to adapt services to the type and degree of disability of customers (e.g., use of sign language);
- provide an effective system to monitor the quality of ZUS customer services and the hierarchy of customer needs and expectations.

The Mystery Shopping method gives clear clues on improving the quality of customer service. In addition, the research reports provide strategic information to the ZUS Management Board and show the level of customer satisfaction with ZUS services.

Currently, the Customer Service Department conducts research in a uniform manner for each ZUS unit, based on prepared interview scenarios. The research covers staff knowledge of customer service, and work organization in customer service halls and its compliance with ZUS service standards including:

- how easily the customer reaches the service counters;
- appointment waiting time;
- orderliness in customer service halls and workplaces;
- employee appearance in terms of clothing standards;
- compliance with protection of personal data provisions;

- the manner and quality of service.

The research results are analysed on an ongoing basis and are forwarded to ZUS branches to take possible remedial actions.

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 aim of the research is to recommend measures to improve the quality of ZUS customer service. Meeting customer expectations is not possible without knowing what these expectations are. Such knowledge is acquired through constant monitoring of customer satisfaction with ZUS services. The ZUS customer satisfaction management programme including the Mystery Shopping research supports the transfer of research results and conclusions to the critical areas of ZUS operations. The recommendations, targets and ad hoc measures support the design of changes to improve services including the customer service. Feedback from the Mystery Shopping research is sent to ZUS branches, resulting in periodic activities that include analysis of the current status, preparation and implementation of possible remedial actions, and monitoring. Changes in the organization and available types of services result in improvement of customer service quality, meeting customer expectations to the extent possible, and an increased level of customer satisfaction.

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.

In light of the conducted research, there is a growing trend to constantly assess the quality of ZUS customer service. The strongest aspects of services are kindness and friendliness of ZUS staff and the working conditions in ZUS units. Quality and intelligibility of information provided by employees is highly rated. In addition, there is a growing trend in fulfilling business outfit preferences and the time devoted to handle a customer case. More and more units meet the visual standards of customer service halls, organization and equipment.

Compliance with standards was verified by the research in two areas: services and infrastructure. The rate of compliance with standards in direct customer service (“services”) in subsequent Mystery Shopping research has been growing, with the third and latest stage at 76.1 per cent or an increase of 6.2 percentage points from the first stage. Meeting business service standards (second stage of research) has been rated by entrepreneurs at 78.1 per cent or an increase of 10.3 percentage points from the first stage.

In terms of type of ZUS unit, the ZUS field offices were the best rated in terms of customer services (77.8 per cent or an increase of 7.1 percentage points from the first stage); followed by inspectorates (76.7 per cent or an increase of 7.4 percentage points from the first stage); and branches (73.1 per cent or an increase of 1.0 percentage point from the first stage). Field offices

and inspectorates, rated the lowest, have shown the largest improvement in compliance standards as a result of trainings and feedback given to staff on research results on direct customer service.

The rate of compliance with standards in “infrastructure” increased in subsequent rounds of the research. In the third stage of the research it was 92.7 per cent or an increase of 6.5 percentage points from the first stage.

Meeting the standards in “infrastructure” is evaluated by all groups of customers, namely, entrepreneurs, insured persons and beneficiaries. In terms of type of ZUS unit, the branches were the best rated in infrastructure as in the two preceding stages of the research (93.4 per cent, an increase of 4.3 percentage points from the first stage), followed by inspectorates (92.6 per cent, an increase of 6.4 percentage points from the first stage), and then the field offices (91.8 per cent, an increase of 9.3 percentage points from the first stage). Because of investments in rooms and buildings infrastructure, the highest standards were met in the small units (field offices), which were rated the lowest.

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.

ZUS experience shows that it is extremely helpful to use the services of a professional external company to learn the Mystery Shopping method of research in customer service. Since large scale, commissioned research cannot be implemented (due to available resources), self-conducted research allows for an ad hoc check of the situation in the facilities. However, such research is not systemic. Another problem may be that after some period of research, the mystery shoppers become recognizable, especially if they are people from the organization’s resources.