A strategy for guiding clients to the most efficient service delivery methods
A case of the Quebec Pensions Board

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Quebec Pensions Board
Canada
Summary

In the 2000s, the Quebec Pensions Board began offering its clients new ways to use its services via Internet and telephone via interactive voice response (IVR). These additional methods led the organization to review the ways it operates and guide clients towards using the most efficient methods, while continuing to offer free choice and maintaining the quality of services. The changes included a new strategy with an action plan and targets to be met. It was rolled out in 2007 and has been updated based on changes to service delivery. All objectives were met within five years and clients report that they are still satisfied with the services offered. The results were particularly impressive because the number of clients and requests increased significantly during that period.

CRITERIA 1

What was the issue/problem/challenge addressed by your good practice?

Quebec has been dealing with an aging population for several years. During that time, it has also faced economic conditions that require public agencies to tighten expenditures and workforce numbers. The Quebec Pensions Board has thus had fewer resources and increased demand for its services. Against that backdrop, the Board initiated an effort in the early 2000s to develop new service delivery methods that emphasize client autonomy and organizational efficiency. Services via Internet and interactive voice response (IVR) were thus added to those already offered via traditional methods - telephone, postal mail and in-person service.

The Board came to understand that simply offering services via Internet and IVR would not lead clients to use them. To meet this challenge, clients had to be guided toward using the most efficient methods, while continuing to offer a free choice and maintaining service quality. The Board thus implemented a strategy allowing it to use every client contact as an opportunity to influence the client's subsequent use of its services.

CRITERIA 2

What were the main objectives and the expected outcomes?

The objectives targeted and the results sought were as follows:

- Reduce telephone use for those services available on a self-service basis.
- Significantly reduce the use of postal mail.
- Significantly reduce the use of in-person service.
- Reduce the volume of emails received.
- Maintain a high level of client satisfaction.
CRITERIA 3

What is the innovative approach/strategy followed to achieve the objectives?

One of the conditions for success was that the entire process was coordinated by a committee that included all directors involved, in one way or another, in delivering services. This sent a clear signal to all employees of the organization's commitment.

First, to ensure that the strategy would produce the best results, the Board studied efforts elsewhere in Quebec and within other organizations around the world.

Next, it drew on one of its key assets: its personnel. To define the activities supporting the strategy, approximately 40 employees from all service delivery sectors participated in brainstorming sessions to draw out the best ideas. The brainstorming session was planned to be as open-ended as possible, with evaluation scheduled for a later phase. More than 200 promising ideas were generated to complete the strategy and generated the following action plan:

Educate the entire Pensions Board about:

- client expectations and regular practices with regard to using service delivery methods;
- strengths and limitations of each method;
- an overall picture of current service delivery.

Define the role each method plays in delivering the Board's services:

- Which method is most appropriate to which services and which clients?
- Which objectives should each method address and what is the target to be achieved?

To expand Internet and IVR services, taking into account best practices, client expectations and the organization's objectives. For example, add the following services:

- Simulate the client's financial situation at the time of retirement (Internet).
- Apply for survivors' benefits (Internet).
- Request a statement of participation (IVR).
- View the client's complete file via the "My account" online service (Internet).
- Etc.

In all communications (including brochures, the website, forms and letters):

- remind clients about the special Internet (and other) methods;
- provide a universal communication method, such as telephone or postal mail, to ensure that all clients have access to all services;
- respect the client's free choice.

Encourage more personnel and partners to guide clients toward the methods that the Board seeks to emphasize.
CRITERIA 4

Have the resources and inputs been used in an optimal way to achieve the set objectives and the expected outcomes? Please specify what internal or external evaluations of the practice have taken place and what impact/results have been identified/achieved so far.

To ensure that resources are used optimally:

- objectives and indicators were established;
- progress was monitored annually;
- the target defined was monitored quarterly;
- clients were consulted three times (2006, 2008 and 2010).

In 2011, when the process was evaluated, all objectives had been met.

<table>
<thead>
<tr>
<th>2006 objectives:</th>
<th>2011 results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase the use of self-services</td>
<td>Self-service used tripled (45 %).</td>
</tr>
<tr>
<td>Reduce telephone use for those services available on a self-service basis.</td>
<td>Telephone use fell by 25 %.</td>
</tr>
<tr>
<td>Significantly reduce the use of postal mail.</td>
<td>Postal mail use fell by 9 %.</td>
</tr>
<tr>
<td>Significantly reduce the use of in-person service.</td>
<td>In-person interviews fell by more than half (59 %).</td>
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<tr>
<td>Reduce the volume of emails received.</td>
<td>Use of email fell by 11 % and the number of visits to the Board's website rose by 176 %.</td>
</tr>
<tr>
<td>Maintain a high level of client satisfaction.</td>
<td>– More than 95 % of clients stated that they had a good or very good opinion of the quality of services offered by the Board. – 90 % of clients stated that they can choose the communication of method that they prefer. This rate remained stable over the period.</td>
</tr>
</tbody>
</table>

The results were particularly impressive because the number of clients and requests increased significantly during that period.
### Quebec Pensions Board

<table>
<thead>
<tr>
<th>Clients</th>
<th>Change</th>
<th>Child support clients</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributors</td>
<td>+ 6 %</td>
<td>Families</td>
<td>+ 1 %</td>
</tr>
<tr>
<td>Beneficiaries</td>
<td>+ 21 %</td>
<td>Families with a disabled child</td>
<td>+ 23 %</td>
</tr>
<tr>
<td>Requests for services</td>
<td>+ 12 %</td>
<td>Client requests for:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• births;</td>
<td>+ 10 %</td>
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<tr>
<td></td>
<td></td>
<td>• new residents;</td>
<td>+ 87 %</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• disabled child supplement.</td>
<td>+ 45 %</td>
</tr>
</tbody>
</table>

This strategy and all the work associated with it helped to ensure service quality despite increased demand and reduced human and financial resources.

### CRITERIA 5

**What lessons have been learned? To what extent would your good practice be appropriate for replication by other social security institutions?**

First, we must emphasize that clients will not use Internet and IVR services just because they are available. Communications plans are necessary to introduce the new services, but their impact may not last if all of the organization's actions are not consistent with the expected objectives.

Second, although Quebec's population is aging and some of the Board's clients are elderly, this effort showed that clients' use of self-service can increase while respecting their needs and preferences.

Last, the Quebec Pensions Board approach can be applied to other organizations. Although Internet-based services are now being developed widely, few organizations can manage all methods of service delivery in comprehensive fashion. Consequently, only some have adopted a strategy to guide their clients towards the most efficient delivery methods. This explains why, since this strategy was implemented, nearly 10 organizations have expressed interest in learning more about and applying the Board's methods.

In addition, the Board's practices were documented in a Canada-wide report, "Rapport sur la gestion et la migration des modes de prestation," drafted in January 2012 by the Public Sector Service Delivery Council and the Public Sector Chief Information Officer Council. These practices were also shared within the Centre d’expertise des grands organismes du gouvernement du Québec.