



Social Security Administration

Agency-wide Customer Experience Efforts

2020 Action Plan

Who are we?

We administer three programs under the Social Security Act: the Old-Age and Survivors Insurance (OASI) program, the Disability Insurance (DI) program, and the Supplemental Security Income (SSI) program. These programs provide vital financial support to some of the most vulnerable members of our society, including retirees, surviving family members, and people with disabilities. Each month, we pay benefits to more than 70 million eligible individuals.

When individuals need Social Security services due to a major life event – birth of a child, onset of a disability, their retirement, or a death of a loved one, they may conduct business with us through three main service channels: online, over the phone through our National 800 Number, or by visiting one of our local offices.

Our website provides a wealth of information and a suite of online services. We serve more than 40 million visitors annually in our network of 1,500 offices nationwide and handle over 33 million telephone calls on our 800 Number. Each day, approximately 173,000 people visit and 233,000 call our local offices for a variety of reasons, e.g., initiating or inquiring about their claim status or benefits, scheduling an in-office appointment, requesting a new or replacement Social Security card, or updating their contact and personal information.

Our CX Action Plan focuses on the customer experience with our 800 Number service channel and addresses the impact of COVID-19, which has exacerbated the service issues on our 800 Number that we have been working to improve.



How do we deliver value to the public?

Major life events
services

Occasion

Birth - Our relationship with our customers begins when we assign a Social Security number (SSN).

The purpose of the SSN is to identify and accurately record wages or self-employment earnings for potential Social Security benefits.

Disability - Established in 1956, the DI program provides benefits for qualified workers who become disabled and their families.

Established in 1972, the SSI program provides financial support to qualified aged, blind, and disabled adults and children with limited income and resources.

Retirement - Created in 1935, the OASI program provides retirement and survivors benefits to qualified workers and their families.

Death of a Loved One - The loss of a family wage earner can be devastating both emotionally and financially. Social Security helps by providing monthly benefits for the families of workers who die.

High-Impact Service

The initial application for the SSN is usually completed through a hospital (generally at the birth of a child), Federal, or State agency that collects this information and electronically transfers the data to us. Individuals can also apply for the SSN card by visiting a local office.

Individuals applying for disability benefits may file online or schedule an appointment to complete an application at a local office or over the telephone.

Individuals applying for retirement may file online or schedule an appointment to complete an application at a local office or over the telephone.

Individuals over the age of 18 can sign up for a free and secure [my Social Security](#) account online to access their Social Security Statement, check their earnings, and estimate their benefits.

Eligible family members may file an application for survivor benefits by completing an application at a local office or over the telephone.

Offering

A Social Security number is important because you need it to get a job, collect Social Security benefits and get some other government services.

The DI and SSI programs pay benefits to people who cannot work, because they have a medical condition that is expected to last at least one year or result in death.

Retirement benefits replace a percentage of a worker's pre-retirement income based on their lifetime earnings.

We issue a one-time payment to an eligible spouse or child of a deceased beneficiary. We also pay survivor benefits to eligible widows, widowers, children, and dependents based on the deceased's earnings record.

Background: 800 Number Service

Our 800 Number handles over 33 million calls each year. Callers can conduct a variety of business transactions by speaking directly with an agent or through our 24-hour automated services, which include requesting benefit verification letters, ordering replacement Medicare cards, or obtaining claim status updates.

Customers who call our 800 Number can experience lengthy wait times to speak to an agent. Given the importance of reducing the wait times for our customers, we developed an Agency Priority Goal for fiscal years (FY) 2020–2021 to “Improve the customer experience by reducing the Average Speed of Answer on the National 800 Number.”

Effective March 17, 2020, we took steps to protect the public and our employees from COVID-19. We suspended in-person service to the public in our local offices nationwide; however, our employees remain available to resolve questions and take applications for benefits by phone. Similarly, we closed our physical telephone service centers and moved to a virtual 800 Number work environment. We also reduced our 800 Number operating hours from Monday through Friday 7:00 a.m. to 7:00 p.m. to 8:00 a.m. to 5:30 p.m. local time to increase our ability to handle call volumes during the pandemic.

The following slides highlight our continued focus on improving our 800 Number services and performance while balancing the challenges of delivering our core mission services, currently in an agency-wide remote work environment.



Where could we improve?

Improving 800 Number Wait Times

Steps

Customer Steps

Name and describe the main steps that a person takes to use the service, left to right, start to finish.

Service System

Describe the channels, roles, and tools from your agency or partners.

Pain Points

Describe the highest priority problems to solve

1: Customer Contact

- When applicants or beneficiaries have questions or are seeking Social Security services, they may visit our website, local office, or call our 800 Number.
- We offer some automated services to help callers avoid lengthy wait times to speak with an agent.

2: Speaking with an Agent

- When an applicant calls, they may opt to use the automated services or wait to speak with an agent.
- Telephone agents can complete some transactions such as assisting with *my Social Security* account maintenance activities, inputting changes of address, answering direct deposit questions, responding to Medicare inquiries, accepting reports of death, and scheduling critical telephone appointments, while also staying alert to potential fraudsters.

3: Post Call

- When the agent completes a transaction with a customer, the caller is transferred to our automated post-call survey. The survey asks callers to respond to questions about their service experience.
- Post-call survey functionality is not available on our current platform. We are working to add this functionality.

- Post-call survey responses provide real-time data that informs the development, design, and implementation of service improvements.

- At this time, post-call survey functionality is not available on the routing platform implemented to operate our 800 Number remotely. We are working to add this functionality.

- We continue to focus on improving and offering more self-service options on our 800 Number.

- 800 Number agents use a call routing system to answer calls from a nationwide queue of callers waiting to speak with an agent.

- We quickly developed a routing platform that allows our agents to work remotely during the COVID-19 pandemic. We also increased the agency's systems bandwidth to support an increased volume of remote users. Lastly, we procured equipment to enable our agents to take calls from home using softphone technology.

- We had a limited number of agents available to conduct SSA business by phone at the beginning of the pandemic. Initially, only 25 percent of our agents were equipped to work from home.

- Office closures and limited agent availability contributed to an increased call volume. Customers may experience higher than normal busy rates and extended wait times to speak with an agent. However, we have been improving our 800 Number service indicators with the implementation of this new routing platform.

- Unfortunately, fraudsters are impersonating agency employees and targeting our customers with telemarketing calls or using social media platforms and phishing scams.

- In response to increased fraudulent activity, we released a new 800 Number and OIG fraud hotline message to inform the public of Social Security impersonation scams.

What will we do?

Purpose

*Why did your agency undertake this project?
What does it hope to achieve, in specific performance indicators, if possible.*

What is the problem?

- Our customers are experiencing lengthy wait times on our 800 Number to speak to an agent.

Desired future state?

- Our goal is to Improve the customer experience by reducing the Average Speed of Answer (ASA) on the 800 Number. ASA is the average amount of time callers wait in queue to be answered by an agent. Wait time begins when the call is placed in queue and ends when the agent answers.
- We also plan to reduce our Agent Busy Rate (ABR). The ABR is the percentage of calls routed for live agent service that encounter a busy call back message.
- We plan to modernize employee training delivery capabilities by expanding virtual training modalities.
- We will launch self-service applications, enabling callers to complete additional actions without an agent.

Any measurable indicators and targets?

- Reduce ASA to 17 minutes (Q4 FY 2020) *
- Reduce ABR to 12 percent (Q4 FY 2020) *
- Reduce ASA to 11 minutes (Q4 FY 2021) **
- Reduce ABR to 7 percent (Q4 FY 2021)**

*COVID-19 may impact our ability to achieve these targets.

**The FY 2021 targets will be finalized with the FY 2021 enacted appropriation.

Approach

Describe the timeline and work plan to achieve that purpose. If this is an ongoing initiative, describe your progress.

Process, methods, and expertise?

We outlined the following implementation strategies as part of our plan to improve 800 Number services:

- Replace staff losses due to attrition and hire an additional 1,000 agents in FY 2020.
- Streamline training to enable new hires to become more productive in a shorter amount of time.
- Implement technology improvements by launching self-service applications that enable callers to complete additional actions without an agent.
- Continue to monitor call trends relating to fraudulent Social Security schemes to ensure our public education campaign reduces scam-related call volumes.

Timeline, stage gates and dates?

- **Completed** - On-board 400 new agents (Q1 FY 2020)
- **Completed** - Initial training for 400 new agents (Q2 FY 2020)
- **Completed** - Enable simplified authentication for interactive voice recognition (IVR) for claims status callers (Q2 FY 2020)
- **Completed** - Release new fraud hotline message to inform the public of Social Security impersonation scams (Q1 FY 2020)
- Award new contract for a modernized Unified Communications Platform (UCP) to improve service (Q4 FY 2020)
- Implement three new IVR improvements (Q2 FY 2021)

Improving 800 Number Wait Times

Resources

Describe the stakeholders involved, financial and human capital dedicated to the work, and any partners contributing to the work.

Who is responsible?

- Our agents provide service directly to our customers.
- Our Office of Customer Service, within the Office of Operations, monitors and evaluates 800 Number service delivery and customer experience business processes.
- Our Office of Systems leads our automation and technology improvement efforts. This component will oversee the transition from our current telephone system to our new modernized UCP.

Who is contributing to the project?

- We established the Chief Business Officer (CBO) role for IT Modernization and Digitization, to focus on providing more customer-centric and efficient service.
- The CBO's office is taking a holistic approach to identify pain points across all of our customer service channels and recommend innovative solutions.
- As we continue our efforts to replace our outdated systems, we are making progress in transitioning to a more modern IT infrastructure with the technical flexibility necessary to adapt to future demands.

What are we proud of this year?

Service Improvement

Who is the user and what was the problem?

Customers calling our 800 Number are waiting too long to speak to an agent. Our 800 Number agents handle approximately 3 million calls every month. In FY 2019, our ASA peaked in October with our callers waiting an average of almost 40 minutes to speak with an agent. In addition, our ABR peaked in November when over 38 percent of callers received a busy call back message when waiting to speak with an agent. We had been improving these service indicators in FY 2020; however, the COVID-19 pandemic has slowed our improvement (see data on the following slides).

What did you build / improve? What does it do for the public or how you deliver your mission? What was the resulting impact? (Include numbers whenever possible)

We are improving IVR options to make it easier for a caller to reach an agent. Callers can also use our automated services that are available 24 hours a day, including to:

- Request a benefit verification letter;
- Request a replacement Medicare Card;
- Request a form to apply for help with Medicare prescription drug costs;
- Ask to receive a claim status;
- Find the address of a local Social Security office;
- Request an application for an original Social Security card, a replacement card, or a name change to a card.

Any lessons for other agencies emulating this work?

We continue to leverage automation and modernize outdated systems to meet customer demands.

Improving 800
Number Wait Times
Progress to date

Capacity Building

Was this a governance, measurement, organizational, customer understanding, service development, or service delivery capability?

- Service Delivery Capability

What was the new action taken capability and its goal or purpose?

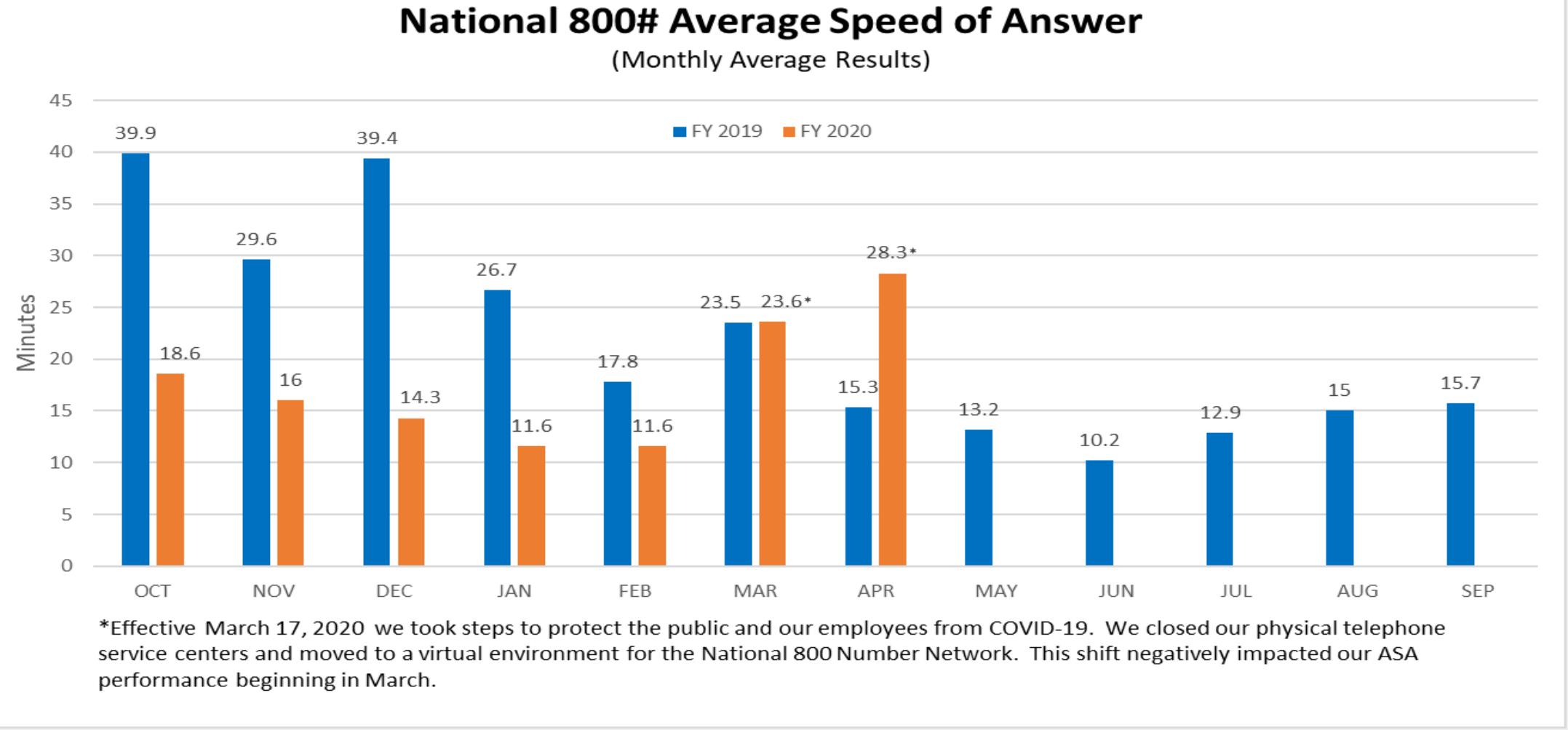
- We hired and trained new employees to increase the number of available agents.
- We increased the number of automated messages available to the public, improved IVRs, and offered more self-service options.
- Lastly, in response to COVID-19, we implemented a routing platform and procured more equipment to enable our agents to continue serving our customers in a remote work environment.

What was the resulting impact? Include numbers whenever possible.

- By the end of April, we handled nearly 21 million calls.
- As of the end of April, our ASA increased to 28.3 minutes as a result of COVID-19. However, our ABR decreased to 6.4 percent (see data on the following slides).
- We are still assessing the impact of COVID-19 on our ability to meet our FY 2020 ASA and ABR targets.

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Improving 800
Number Wait Times
Progress to date



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