

Using Webchat to Provide Advice Services



7 November 2019

Information sources

- Webchat and email pilot evaluation report
- Local Citizens Advice workshops
- Mid Beds Help to claim webchat

Webchat and email pilot 2015-2017



citizens
advice

Key findings - Webchat and email

Webchat has proved to be an appropriate channel to provide advice and assistance, evidenced by the following results:

- 85,368 webchats completed demonstrating client demand for this channel
- 27,413 email contacts
- Webchat was offered first, email only if webchat wasn't available
- Benefits, employment & housing most popular subjects
- Webchat found to be appropriate
- Average chat time was 20 minutes, however some clients were happy to stay in the chat for longer periods and receive full advice.

Lessons learned

- There is demand from clients for CA services to be delivered by webchat.
- Analysis of topic areas, combined with feedback from advisers suggests we are accessing a new client base through webchat and not that clients move from other channels to webchat.
- Many advisers really enjoy webchat and get an increased sense of satisfaction from helping many clients in a short space of time.
- Some advisers prefer email as this allows time to research and craft a response that can be checked before being sent to the client.
- Full exploration is difficult on webchat.
- Signposting is not always enough to meet the client's need. Using discrete advice more often helps the client to find a way forward.
- Having a supervisor readily available in the room has proved useful for facilitating the adviser in providing discrete advice and increasing our ability to deal with the client at the first point of contact. Therefore this is the recommended approach.

Meeting client needs – the upside

- Webchat gives instant access and immediate response
- It can support people who can't come into the office or don't like face-to-face
- The client can remain anonymous, but with a case reference
- It provides a quick shot of information
- Client can be given links to other resources and services during the chat
- Webchat transcript can be emailed to the client
- It is possible to refer client to specialist services such as debt advice, Pensionwise, Help to Claim

Meeting adviser needs – the advisers feedback

- You can help more clients
- It is an exciting medium
- The pace is fast with quick results
- It offers a different type of engagement
- It is another medium to access the Citizens Advice service
- It allows us to engage with another type of client



“Clients who are typically unable to contact the bureau during the day (for example, unable to phone due to work, or unable to attend a drop-in session), can use the E&WC service to gain information and support. It can be a more accessible service for the client.”

Gary Malcolmson - Bolton

“Diversity of channels - progressive - open more doors to clients who would not have used our service.”

Jamie - Manchester

Meeting client needs – the downside

- Full exploration is difficult on webchat
- Managing expectations at the start of the chat
- Keeping the client engaged can be challenging
- Signposting is often not enough to meet client needs
- Using discrete advice more often helps the client to find a way forward

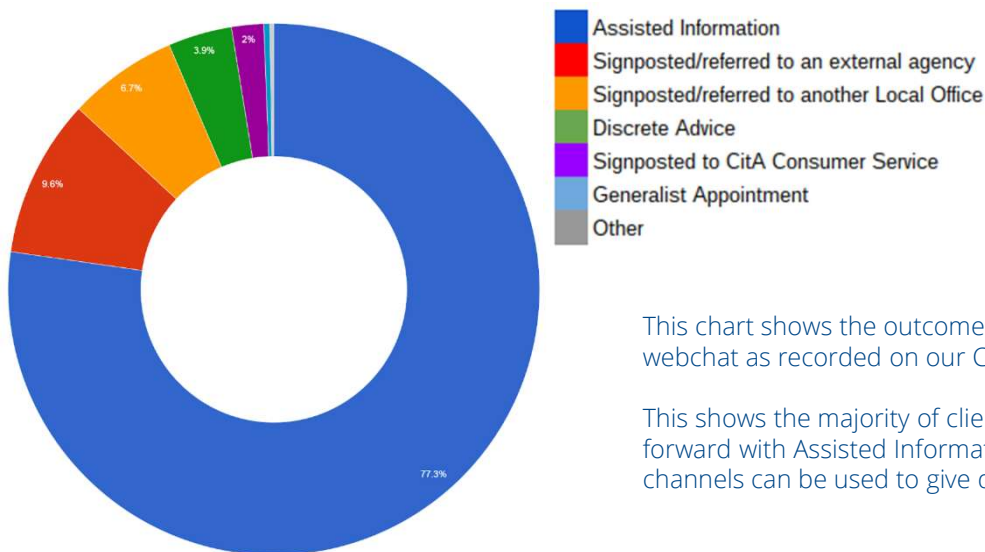
Email versus webchat

- Webchat is fast paced and requires a confident Advisor who is capable of typing and responding quickly, controlling the chat in order to build rapport and ask relevant questions in a manner that will elicit a response rather than cause the client to disconnect.
- Email also requires IT literacy and strong research skill, but affords the Advisor the luxury of time. Allowing for more methodical research and drafting of responses which may make the channel more appealing to some.
- The nature of email has lent itself as a training tool, especially as responses can be thoroughly checked, and re drafted before being sent.
- Others have found email frustrating because of the delay and reduced ability for exploration of the clients issue.

Appropriateness and impact of email and webchat channels



What kind of service can we offer on webchat and email?

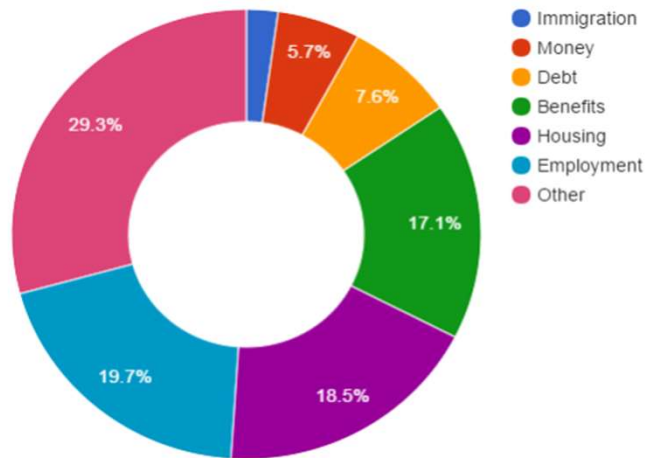


This chart shows the outcomes of email and webchat as recorded on our CRM

This shows the majority of clients were moved forward with Assisted Information and that the channels can be used to give discrete advice.

What do clients want to chat about?

Topics selected by client before the chat



We compared how clients and advisors classified chat topic for 4 months, collecting a sample of 10,003 webchats.

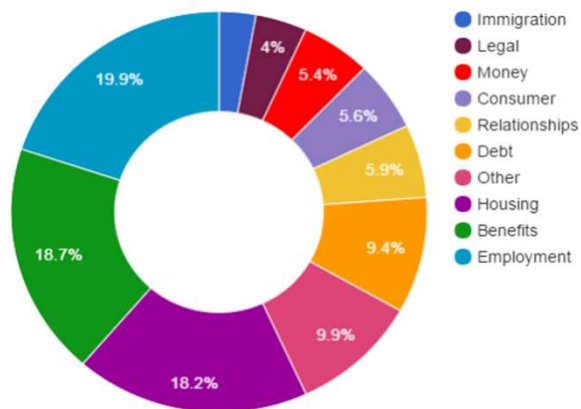
The main 3 topics for the sample range remain as **Benefits, Housing and Employment**. A high number of clients selected 'other' as their topic for the webchat.

Anecdotal feedback

Throughout the project we asked the participants for their feedback on all aspects of the service. Advisors fed back that employment is a popular topic on webchat, and occurs much more than on face to face services.

What do clients want to chat about?

Topics as categorised by advisers after the chat



Topics categorised by the advisers shows again the main topics are **Benefits, Housing and Employment**. However we see the emergence of some new topics which aren't offered as a selection for the client, such as Legal, Consumer and Relationships.

Help to Claim Webchat Mid Beds top 3 enquiry areas

- What benefit can I get?
 - Full benefit check or link to benefit checker such a 'Entitled to' or 'Turn to Us
 - Refer for phone advice
 - Refer to face to face
- Where the client's get stuck on a claim
 - Always check eligibility – should they be claiming UC?
- Advance Payments

Thank you

Jenny Hedges
Citizens Advice Mid Bedfordshire

