

Quality of service in telecoms

Residential consumer and SME experiences of quality of service in fixed line, broadband and mobile telecoms

February 2016

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1. Executive Summary

1.1. Objectives and approach

This is a report on qualitative research carried out in November 2015 examining telecoms quality of service issues among residential consumers and small and medium-sized enterprises (SMEs) across all four nations in the UK.

In this report the term ‘quality of service’ encompasses two elements: *service performance* (i.e. how good or poor the provision of the subscribed-to service is) and *customer services* (i.e. the experience of dealing with a retail provider’s customer services in relation to the subscribed-to service.) The research examined fixed line, broadband internet and mobile services received at home or in the workplace.

The principal objective of the research was to understand residential consumers’ and SMEs’ good and bad experiences in relation to the quality of service received in relation to telecoms. The research focused on four key components of telecoms services:

1. Service installations;
2. Support or repair when things go wrong;
3. Reliability of connection; and
4. Customer service when contacting the provider for any other reason.

The project consisted of 20 1½-hour group discussions, ten among residential consumers and ten among SME consumers. Each group consisted of seven or eight participants, both men and women. The sessions took place in nine of the ten regions in which Openreach’s operations are organised, with a residential and SME group in each. A rural and urban perspective was also reflected in each location, either in the residential group or the SME group. Areas with Virgin Media cable coverage were also accommodated in the structure, though this was not possible in three of the rural locations visited because participants did not live or work in postcodes where Virgin Media is available.

With the residential groups, each session comprised a mix in terms of participants’ ages, lifestyles and household composition. This included younger, pre-family singles or couples, families with younger and older children and older and post-family consumers. In half of the residential groups participants were drawn from less affluent C2D social groups; in the other half they were drawn from more affluent BC1 groups.

The SME groups comprised individuals with responsibility for their business’s telecoms, either as part of their job or as their central role or job title. The business sessions were split between groups combining micro/small SMEs (1 to 50 employees, including some sole traders) and groups with medium-sized SMEs (50 to 249 employees). In each SME group a range of sectors and industries was represented.

All participants – both residential and SME – were recruited to the research on the basis that they had recently experienced two or more of the four service components listed above, with all four service components represented within each group as a whole.

In all residential and SME groups there was a mix of customers of the main retail providers of all three services, including – where available – Virgin Media cable. (In the case of mobile network operators in rural areas, some groups only featured one or two brands, due to lower penetration of some operators as a result of coverage issues.)

Pay TV was not within the scope of the research, which centres on telecoms connectivity. However, we note that it was an issue residential customers touched on in the groups, because of its role in the ‘triple-play’ (i.e. fixed line, broadband and pay TV) packages to which they subscribed. Also, because of the increased use of self-installation products and remote switch-on by providers, pay TV may be the only experience some consumers now have of product installation involving an engineer visit. Ultimately it is apparent that pay TV is a part of residential consumers’ decision-making and experience in relation to telecoms. Therefore it is not always possible for them to isolate it from their perceptions of service quality.

1.2. A note on the report

This report is based on the views and experiences of around 160 UK consumers, half of them residential consumers and half of them SME consumers. The findings included in the report are therefore indicative and are not intended to be a comprehensive national picture of consumers’ views. References to ‘most’, ‘some’ or ‘a few’, etc. in the report are relative to the size of this sample of 160 participants.

Residential and SME consumers both held similar opinions about several of the issues discussed during the research. Where residential consumers’ views and experiences differed from SME consumers’ (and vice versa) we have made this clear. Where we have described ‘many consumers’ or ‘some consumers’ without specifying residential versus SME, the reference is to consumers of both types.

1.3. Overview of key findings

Telecoms are increasingly thought of as being similar to a utility

Most of our group participants believe that their telecoms services are an increasingly essential part of their home or business life. The consumers and businesses that participated did not consider service performance issues to be a matter of life and death, except in emergency situations. Nevertheless, consumers say the disruption and inconvenience caused by telecoms failure can feel on a par with a power cut or loss of water supply.

Quality of service consists of service performance and customer services

Both residential and SME consumers believe that telecoms quality of service consists of two elements: *service performance* and *customer services*.

Service performance relates to how well or badly the subscribed-to service functions. Factors that affect service performance include the reliability of a service and the consistency of connectivity it provides. Customer services is a term covering all the ‘touchpoints’ consumers may experience when contacting their retail provider’s customer services in relation to the subscribed-to service. It includes phone contacts (the principal channel in most cases), face-to-face elements (including retail stores and any engineers encountered ‘on the ground’) and webchat/online portal channels which some consumers increasingly use.

The key requirement for service performance is simply that the subscribed-to service works reliably

Consumers say that, in overall terms, telecoms services in the UK are typically reliable and, in the case of mobile and broadband in particular, more reliable (in terms of coverage and speed) than when they were in their infancy 20 years ago. The quality of fixed line phone services has been good in this country for many years. Therefore the telecoms services they subscribe to generally work as expected or advertised when they use them (e.g. broadband at the right speed, a 4G mobile signal, etc.). Although service quality performance problems occur, our research participants experienced them infrequently.

As this essential functionality tends to be what is delivered by providers most of the time, this has become the key requirement for service provision for consumers – services that work as expected when used. Therefore, given how much consumers rely on telecoms services, when things go wrong the inconvenience that consumers experience is even more acute.

The key requirements for customer services relate to the speed and efficiency of getting any issues resolved

At an essential level, consumers want any issue they face with their telecoms services to be resolved as quickly and as efficiently as possible by their provider's customer services. Therefore they tend to evaluate their experiences on the basis of how long a problem takes to be resolved from the time they report it to the time it is fixed, and how much of their time is involved in this process.

At the heart of this is consumers' desire to get any issue off their 'to-do' list. They require their provider to take immediate ownership of the problem and manage the process of resolution effectively, especially in a situation where the issue has to be escalated within the provider's business in order for more senior/expert personnel to deal with it. Throughout this process, the provider proactively taking responsibility and the quality of ongoing communication are paramount.

The manner in which customer services personnel deal with consumers' issues also plays an essential role in overall perceptions of the experience. Consumers want to deal with staff who are helpful, polite and efficient and who display empathy, demonstrating that they understand the significance of the problem triggering the call. Customer services which are deemed excellent are those that are proactive in relation to providing updates and compensation for problems, and flexible when it comes to scheduling any engineer visits.

The speed and efficiency with which problems are resolved determine the overall impact that quality of service issues have on consumers' lives

When consumers experience poor quality of service in telecoms, two factors are typically involved. First, time – i.e. how long the problem lasts, both before and after the consumer contacts their provider. Second, the efficiency of the process once they contact customer services to resolve their issue. Therefore, a relatively major issue – e.g. the loss of broadband – will be deemed merely annoying if it is resolved (or resolves itself) quickly. Meanwhile, a relatively minor issue – e.g. a billing query – will quickly escalate from annoying to something much more serious if the customer service experience is slow and cumbersome. Therefore, service provision and customer services are closely interrelated: how the provider responds to the issue can make all the difference in relation to the impact of the original issue on the consumer.

At its worst, poor quality of service combining a service provision problem with a poor customer services response can have a significant practical, financial and emotional impact on people's lives, although the specifics differ between residential and SME consumers (these are discussed in more detail in the main body of the report).

Residential consumers have relatively low expectations of telecoms customer services

Most residential customers who participated in our research do not have to contact their retail providers' customer services very often, but their expectations of them are generally poor, either because of direct past experience or because 'horror stories' from peers have encouraged them to feel negative.

According to consumers, there appears to be a mismatch between the leading edge technology of the products and services telecoms retail providers sell and the nature of the customer services they provide to support their customers. Moreover, telecoms providers' customer services are nowadays believed to lag some way behind the best customer services consumers experience in other markets, be that retail, banking, and sometimes utilities. These customer services are praised for their flexibility, proactivity and smart use of the latest technology, elements that are felt to be relatively rare in telecoms.

SME consumers can have relatively higher expectations of telecoms customer services

For SMEs, particularly larger businesses, expectations of telecoms customer services can be higher than those of residential customers. They are usually paying more for their telecoms than residential consumers, and expect to receive better customer services as part of that package (e.g. a dedicated business contact number, a dedicated service team including a consistent account manager, etc.). SMEs also typically see telecoms as business-critical and therefore make higher demands of the overall service they receive.

However, not all SMEs are having their expectations met: many larger companies in particular have been unimpressed with the calibre of their provider's business team whose understanding of issues can seem lower than their own, or they have found that there is a constant turnover of 'dedicated' account managers. As a result, many of the companies use the services of a third-party supplier to manage the relationship with their ultimate telecoms provider.

Quality of service (both service performance and customer services) plays a limited role in retail purchasing decisions among both residential consumers and SMEs

For residential consumers, quality of service plays a limited initial role in a consumer's choice of provider; it is the promise of the product or service (in terms of speed, capacity, coverage, etc.) that principally counts, along with the price. There is a general assumption that all providers are much the same – the only exception to this that participants reported is the limited number of occasions where consumers have switched away from a provider for other reasons, only to come back because the quality of service experienced with the new provider was inferior.

Thus where quality of service *can* play a role in residential decision-making is in driving a consumer to switch away from one provider to another: while the new provider's product may be the key driver, poor experience with the former provider's quality of service can also be a factor (e.g. ongoing service provision problems or a poor customer services experience).

Among SMEs, quality of service can play more of a role in decision-making, although the product/value elements remain paramount. Most business contracts contain details of service requirements with accompanying service level agreements (SLAs).

As with residential consumers, poor quality of service experiences can be a factor in the decision to switch provider for SMEs. However, some businesses are reluctant to switch provider because of the disruption involved. Many employ third-parties to resolve any service provision problems on their behalf, and shield them from any customer services issues.

Coordination between telecoms providers and between providers and Openreach does not always work seamlessly, although most consumers – particularly residential – have not experienced any related problems

Most residential consumers are rarely affected by coordination breakdowns between retail providers. They are also only rarely affected by coordination issues between retail providers and Openreach. Certainly older consumers with past experience of coordination issues say the situation is much improved: they note that consumers no longer have to contact both their old and new provider on the Openreach network as a matter of course when switching provider.

Nevertheless, individuals do give some examples of significant coordination breakdowns:

1. Scheduling and briefing of repair or installation jobs by retail provider – sometimes wholesaler engineers come late or without a proper understanding of the job involved or the right kit or tools to complete it; and
2. Retail providers committing to engineering jobs that wholesalers cannot ultimately fulfil because of technical issues 'on the ground' (e.g. space for new cabling in the local junction box).

Among SME customers, particularly in larger businesses, awareness of coordination issues is often higher than among residential consumers, because IT managers, etc. tend to have a better knowledge of the different parties involved in the provision of telecoms services and the occasional breakdown between these parties. In addition, the knock-on impacts tend to be greater when there is more than one party involved and so a delay in one service can lead to delays elsewhere (e.g. when installing a new line). Mitigating against the problems of coordination is one of the reasons larger SMEs employ third-parties: they are seen to have more clout with individual providers than SMEs when there is a breakdown.

Telecoms compensation rights are better understood among SMEs than among residential consumers

Compensation rights are better understood among SMEs, particularly larger companies. Compensation clauses play a significant part in the negotiations larger SMEs have with potential suppliers, as well as the resulting contracts and SLAs. Again, for some SMEs, an additional benefit of using a third-party is that it is perceived to have greater clout with the retail provider when it comes to issues like compensation.

Most residential consumers are unaware that compensation is available – partly because they have not experienced situations where it may apply – though some assume it could come into play in the case of a lengthy loss of service. Consumers say that, unlike rail companies and airlines which to some extent publicise the compensation available to consumers for delays, telecoms providers are

not at all explicit or transparent in this area. Consumers do not know what they are entitled to or the process involved in claiming compensation. Some individuals have received compensation for major problems they have encountered, but this is because the provider involved has been proactive in providing the compensation without being asked. This is deemed excellent service.

Given their lack of experience in compensation matters and the fact that providers are largely silent about the issue, consumers are not confident in specifying what might be reasonable compensation sums for different aspects of service failure. For some consumers, simply paying back the actual cost of the service on the days when any issue occurred could be appropriate, though this could result in the payment of a sum thought to be derisory, particularly if they have had to put in significant effort to receive it. In addition, there is some feeling that compensation should apply on more occasions than just a major or protracted loss of service, and take account of the significance of the problem's impact on consumers' home and work life, or the (poor) quality of the customer services experience.

Rural consumers can feel they receive a relatively lower quality of service compared to their urban counterparts

Rural consumers – both residential and SME – often believe they receive a relatively lower quality of service compared to urban consumers, both in terms of service performance and, in particular, customer services when an engineer visit is required. While this frustrates some SME consumers, residential consumers are who participated in our research are often relatively sanguine about a lower quality of service. It is not that they feel it is fair but they have come to expect it.

In the case of service performance, rural consumers recognise that where they live or work often has some impact. The latest infrastructure may not have been rolled out to more remote locations, which can affect speed (in the case of broadband, particularly if fibre is not yet available) or coverage (in the case of mobile phones). Telecoms in rural locations may be relatively more affected by bad weather.

In terms of customer services, a rural location can also affect the response of providers to problems, particularly those requiring hands-on repair. Engineers may take longer to come to consumers in some rural areas, particularly if there is a problem affecting a wide geographic area

Willingness to pay for superior customer service is low among residential consumers and smaller SMEs, but potentially acceptable to larger SMEs to protect them in the event of emergencies

Residential consumers and smaller SMEs do not in general like the idea of paying more for 'superior' customer service, believing that they are already paying for it as part of their subscription and, therefore, the provider is obliged to offer a fit-for-purpose level of service as standard. However, individuals might be persuaded to pay a one-off extra charge for something like a same-day repair in an emergency (e.g. broadband needed to meet a school homework deadline.)

Similarly, SMEs do not want to pay extra for superior customer services. In fact, many SMEs believe they are *already* paying extra for them since existing business packages and third-party agreements typically involve additional fees for the promise of superior, dedicated customer services compared to residential packages. But, as a one-off, in an emergency, paying extra for an *immediate* response or resolution might be acceptable.

2. Background, objectives and methodology

2.1. Background to the study

Ofcom's Strategic Review of Digital Communications is considering residential consumers and SMEs' experience of telecoms services, including of the quality of service they receive. Quality of service comprises both the reliability of telecoms services (i.e. the basic supply of broadband, fixed line and mobile services) and 'customer services'. For consumers, this term covers everything from customer helplines and the personnel that man the call centres involved, webchat systems, as well as face-to-face aspects of service such as retail stores and engineer visits providing installations or repairs.

Ofcom has commissioned this qualitative research into the views of residential consumers and SMEs to inform its understanding of their experience of service performance and customer service from retail and, where relevant, wholesale providers. Specifically, Ofcom wanted to understand consumer expectations of service quality in fixed and mobile telecoms, and the drivers of satisfaction and dissatisfaction with the services received.

2.2. Research objectives

- To understand what examples of poor customer service consumers experience, and which are most harmful or frustrating;
- To understand what good customer service might look like, including good examples, contributing factors and potential improvements;
- To understand how customer service figures in the decision whether or not to purchase a particular product, including switching to new providers;
- Specifically, to explore:
 - Service installations, including lead times, number of engineer visits required, technical support available, engineer attendance;
 - Support/repair when things go wrong, including lead times, technical support, engineer attendance, flow of information;
 - Customer service when contacting the provider for any reason;
 - Reliability of connection, including consistency of speed, peak time performance, frequency of outages, other measures.
- Additionally, to explore:
 - Rural versus urban issues;
 - Consumers' expectations of compensation;
 - Coordination between retail telecoms providers and wholesalers;
 - Consumer willingness to pay for 'superior' service;
 - Consumers' experience of quality of service in other markets.

2.3. Methodology

This qualitative project consisted of 20 group discussions, ten with residential consumers and ten with SME consumers, and examined quality of service in relation to fixed line, broadband internet and mobile phone services in each session. Each group lasted 1½ hours and contained seven or eight participants. The research was carried out between 9 and 20 November 2015.

The project was carried out in England, Scotland, Wales and Northern Ireland and groups were held in nine of the ten Openreach operational regions. Locations were also selected to include Virgin Media cable coverage areas where possible, and this was achieved in all but three of the rural locations.

2.3.1. Overview of residential group participants

The ten residential groups were divided equally between urban and rural participants. The groups were also split equally between BC1 and C2D consumers. Each group featured a balanced mix of men and women, all of whom were the primary telecoms decision-maker in their household. Each group contained a mix of pre-family, with-family and post-family participants. Finally, all participants classified themselves as 'poor' to 'average' in terms of telecoms knowledge.

All participants were users of broadband, fixed line and mobile phone services with – across the groups – a mix of retail providers. Within each group, each respondent had had recent experience (i.e. in the past three months) of at least two of the four quality of service components, with all four components represented within each group.

Full details of the residential consumer groups and their recruitment criteria are found in Appendix B.

2.3.2. Overview of SME group participants

Like the residential segment, the ten SME groups were split equally between urban and rural businesses and a variety of business sectors was represented. The groups included men and women who were the chief telecoms decision-maker in their business. Half the groups contained a mix of micro SMEs (one to nine employees, including sole traders) and small SMEs (ten to 49 employees). The other half contained medium SMEs (50 to 249 employees.)

As per the residential segment, all participants were users of broadband, fixed line and mobile phone services from a range of retail providers. Each respondent had also had recent experience (i.e. in the past three months) of at least two of the four quality of service components, with all four components represented within each group.

Full details of the SME consumer groups and their recruitment criteria are found in Appendix B.

2.3.3. Approach to the research

The research process comprised a number of components.

On recruitment all residential and SME participants were issued with a pre-task to complete prior to the groups. This consisted of a questionnaire requiring details of:

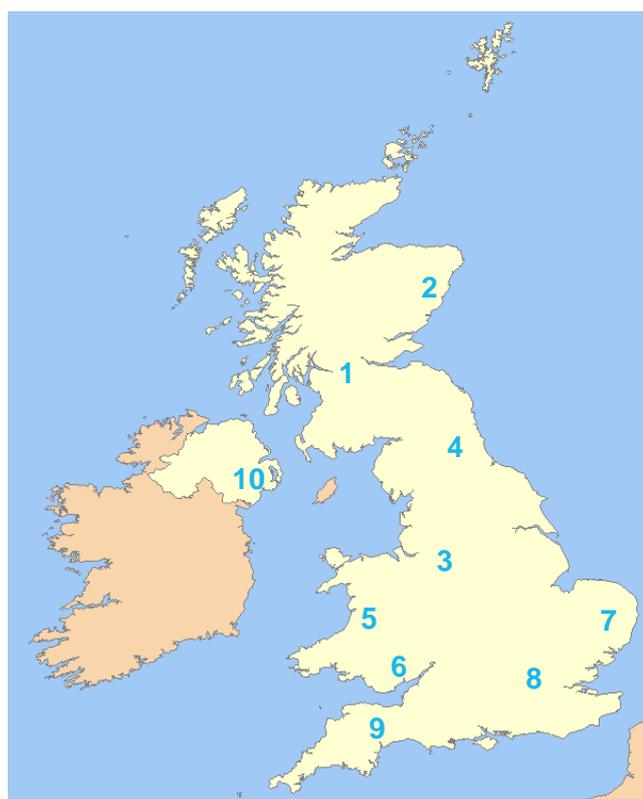
- Current telecoms services and the retail providers involved;
- Current telecoms-related hardware (e.g. WiFi routers, smartphones, tablets, etc.) and typical usage behaviour (e.g. music and movie streaming, online gaming, voice-over-IP (VoIP) calling, cloud-based services, etc.)
- Recent telecoms-related quality of service experiences relating to any of the four service elements, poor and good;

- Recent quality of service/customer services experiences in relation to other markets, poor and good.

In each group, two of the four service elements were explored in detail using consumers' past experiences with their retail providers to establish poor, acceptable, good and excellent levels of service in each. (Across the groups as a whole, all four elements were explored in this way, with reference to broadband, fixed line and mobile.) The outcomes of this exercise provide the data contained in the tables included in Appendix A, which describe in detail the different levels of service – from poor to excellent – in relation to the different telecoms service components.

In order to establish consumer priorities in relation to each service element, the groups concluded with a game in which participants had to 'pay' for acceptable, good or excellent levels of service – depending on their priorities. They were asked to imagine that they were a telecoms service provider and were given a limited budget – using Monopoly™ money – to allocate across all aspects of service they had identified earlier. The outcomes of the games are set out in the tables in section 5. These show the relative importance of the different service elements related to installations, repairs, reliability and other reasons for contacting the provider.

2.3.4. Map of locations and sample structure



1. Glasgow
2. Aberdeen
3. Manchester
4. Newcastle
5. Aberystwyth
6. Cardiff
7. Norwich
8. Watford
9. Exeter
10. Belfast

Fig 1. Map of locations used in the research

Each of the above locations featured a residential and SME group, one session with urban consumers and one with rural consumers.

The detailed breakdown of the group locations and sample structure is outlined in the table below. The three locations without Virgin Media cable are indicated with an asterisk.

Scotland 1		Scotland 2	
<i>Location</i>	Glasgow	<i>Location</i>	Aberdeen*
<i>Residential</i>	C2D, urban	<i>Residential</i>	BC1, rural
<i>SME</i>	Micro/small, rural	<i>SME</i>	Medium, urban
North West		North East	
<i>Location</i>	Manchester	<i>Location</i>	Newcastle
<i>Residential</i>	BC1, rural	<i>Residential</i>	C2D, urban
<i>SME</i>	Micro/small, urban	<i>SME</i>	Micro/small, rural
North Wales		South Wales	
<i>Location</i>	Aberystwyth*	<i>Location</i>	Cardiff
<i>Residential</i>	C2D, rural	<i>Residential</i>	BC1, urban
<i>SME</i>	Micro/small, urban	<i>SME</i>	Medium, rural
East Anglia		London	
<i>Location</i>	Norwich	<i>Location</i>	Watford
<i>Residential</i>	BC1, rural	<i>Residential</i>	C2D, urban
<i>SME</i>	Medium, urban	<i>SME</i>	Micro/small, rural
Wessex		Northern Ireland	
<i>Location</i>	Exeter*	<i>Location</i>	Belfast
<i>Residential</i>	BC1, rural	<i>Residential</i>	C2D, urban
<i>SME</i>	Micro/small, urban	<i>SME</i>	Micro/small, urban

3. Overview of consumers

3.1. Residential consumers, telecoms services and usage behaviour

Most residential customers in our sample receive broadband and home phone services from the same retail provider, typically in a package, and there are a number of people who have 'triple play' packages which combine telecoms with pay TV. In some families all members use the same mobile provider in order to take advantage of the financial benefits this can afford (e.g. free calls to each other, discounted family/group tariffs, etc.).

Despite being at different lifestages, pre- and with-family residential consumers often have the same technology. Both segments typically own several connected devices (i.e. smartphones, tablets, smart TVs, etc.) and routinely use WiFi, catch-up TV (e.g. BBC iPlayer), music and video-on-demand streaming (e.g. Spotify and Netflix), VoIP (e.g. Skype), online gaming and cloud-based systems. In families, there are usually multiple devices in use – nowadays even very young children often have their own tablet – which can affect the broadband speed that they experience if several users are online at the same time.

Older, post-family households tend to have fewer devices and use a more limited number of products and services (e.g. some catch-up TV and movie streaming, but little in the way of online gaming) but nevertheless are wedded to the services they do have.

Across all residential consumers, broadband is generally believed to be the priority telecoms service, with mobile phones often a close second. However, some older consumers feel their home phone is more important than their mobile because they are a generation that uses a fixed line phone more regularly. People of all ages/lifestages in isolated rural areas also feel their fixed line phone is more important than their mobile phone if their mobile signal is unreliable where they live.

3.2. SME consumers, telecoms services and usage behaviour

Small- and medium-sized SMEs (i.e. businesses with over ten employees) generally have business telecoms packages, but micro businesses and sole traders often use residential packages. This is particularly the case among people who work from home and whose residential and business telecoms are one and the same. At the smaller end of SMEs, many businesses in our sample use packages which combine fixed line and broadband, but larger companies tend to use different providers for each, particularly if they have more specialist services like dedicated high-speed lines. In most cases all employees will be on the same mobile network, though companies with roving sales teams or with staff located in rural areas sometimes use different networks based on the reliability of the signal in the particular locations they are operating in.

In smaller SMEs, telecoms tend to be the responsibility of the owner-manager, a non-expert who looks after them along with other aspects of the business. Any telecoms-related problems therefore have a big impact because time spent sorting out, for example, an issue with their broadband will take them away from their principal role in the business. At the larger end of SMEs, telecoms will usually be the domain of a specialist IT/comms manager or director whose job it is to ensure that the telecoms are operating effectively.

It is usually the case that the larger the business, the more complex the telecoms set-up and telecoms usage, hence their need for a dedicated director. With smaller SMEs the complexity of set-up (and the

relative importance placed on telecoms) tends to be highly dependent on sector. For example, a small design agency may have fewer than 10 employees, but have a sophisticated and specialist telecoms set-up including leased lines, etc. which are central to the operation. A building company, meanwhile, may have 50 employees, but have only a relatively straightforward telecoms set-up.

Despite this variation, all businesses feel equally reliant on their telecoms, whether that is in providing the principal products or services the business was set up to deliver, or merely in communicating with customers by phone or email.

Across all SMEs, broadband is generally regarded as the most important service. Nowadays, with the rise in cloud-based systems and VoIP communications which even very small businesses often use, a problem with broadband means many companies simply cannot function. Mobile phones come second in most businesses' telecoms priorities, though they are often the most vital service for one-man-band tradespeople or companies with significant numbers of their workforce operating 'on the road'.

3.3. SMEs' use of third-party suppliers

Many larger SMEs use the services of third-party suppliers who act as intermediaries between their business and the ultimate retail provider. If an SME uses third-parties for more than one service, they usually use the same third-party for each one, but there are instances when an SME – particularly if it has a very complex telecoms set-up – will use different third-parties for different services.

There are a number of reasons why SMEs employ a third-party supplier:

- Business size – the company has a relatively large workforce which may have implications for the complexity of the telecoms services used. This is particularly the case with mobile phones, where larger businesses may have hundreds of handsets to manage;
- Complexity of set-up – the company has IT/telecoms systems extending over a number of sites or branches, or complicated kit, such as sophisticated cloud-based systems or dedicated lines, that require specialist management by a supplier that understands the business set-up;
- Demanding telecoms needs because of the nature of the business – for example, a rapidly expanding retail business regularly opening new stores and needing new phone lines to be installed quickly;
- Budgetary – a third-party supplier can often deliver better prices than a direct retail provider relationship, thanks to the economies of scale the third-party can achieve that the much smaller SME could not;
- Technological – a third-party can often deliver automatic upgrades to kit (e.g. latest generation mobile phones or cloud services) which the SME might not be able to secure in a direct relationship or keep up to speed with.

In many cases, these are rational justifications for SMEs engaging the third-party. However, the initial trigger for making contact with a third-party is often an emotional one, namely the frustration IT managers felt going direct to retail providers, including the slowness of the process and having to deal with call centre staff who do not fully understand their business or their issue.

3.4. Comparisons between telecoms services and utilities

Consumers – both residential and SME – increasingly consider telecoms services to be similar to utilities, in particular because of their apparent ‘essentialness’. While telecoms do not have quite the same life-or-death importance as water, gas or electricity, they are thought to be almost as vital. While being without broadband or a phone line or mobile signal is unlikely to have a genuine impact on their physical comfort or health (except perhaps in exceptional, emergency situations) they do have a significant impact on users’ ability to engage with the modern world, and this may have important practical, financial/commercial and emotional implications. Consumers say that, unlike traditional utilities, it can be harder to work round a loss of service in telecoms – for example, it is possible to resort to candles in a power cut but there is not always an equivalent ‘Plan B’ when it comes to broadband.

Moreover, residential consumers often consider the cost of their telecoms alongside their water rates and gas and electricity charges within their household budgets, indicating they are part of the same category. Fixed line broadband is the most ‘utility-like’ service in consumers’ minds because, like gas and water, it is effectively ‘piped in’ and runs in the background, and only really noticed when not working properly. Fixed line telephone shares these qualities, but its declining role in many consumers’ lives means that, for some, it no longer feels as essential as it once did.

In terms of ‘essentialness’, different products have different levels of importance to different types of consumers:

Broadband:

- Among residential customers, this is often the most important service for younger and family households because of its central role in domestic life (e.g. everything from grocery shopping and banking to children’s homework and family entertainment);
- For SMEs, the increasing use of cloud-based systems and VoIP phone systems makes broadband the key service – managing directors (MDs) and office managers often say that a broadband failure may not cost them money directly, but it does mean that their workforces are literally unable to do their work. For those with e-commerce websites loss of service can directly linked to loss of sales.

Mobile:

- For many younger residential consumers – both pre- and with-family households – a reliable mobile service is vital, particularly for those who have out-and-about lifestyles;
- For certain types of SME, a reliable mobile service is an essential utility – a one-man band plumber is dependent on their mobile for custom; a company with a roving salesforce is seriously compromised if it cannot get a signal while out and about.

Fixed line:

- This is the least important service for younger and family lifestages and typically not considered an essential utility by these groups. It does, however, act as a backup when other services are down, offering a sense of comfort at least in part due to the perceived reliability of the product.

But, for many older households, it is more important than broadband and mobile, particularly for those living in rural areas.

3.5. Rural versus urban issues

Rural consumers – both residential and SME – often believe they receive a relatively lower quality of service compared to urban consumers, both in terms of service performance and customer services. While this frustrates some SME consumers, residential consumers are often relatively sanguine about a lower quality of service – they describe it as a factor of living in the country, alongside having fewer bus services, having to drive some distance to go shopping, etc. It is not that they feel this is fair, particularly as they are paying the same price for telecoms as urban consumers, but it has come to be an expected part of rural life.

In the case of service performance, rural consumers recognise that where they live or work often has some impact. The latest infrastructure may not have been rolled out to rural locations, which can affect speed (in the case of broadband, particularly if fibre is not yet available) or coverage (in the case of mobile phones, because there are fewer masts). In addition, telecoms in rural locations can be more affected by weather conditions than in urban locations.

“Where I am, the floods can take the roads out... and the telephone wires...” (Rural residential consumer)

In terms of customer services, a rural location can also affect the response of providers to problems, particularly those requiring hands-on repair. Engineers may take longer to come to consumers in more remote areas, particularly if there is a problem affecting a wide geographic area. Some consumers also say that engineers may not always be used to dealing with rural buildings: they sometimes arrive at jobs without the right tools (e.g. not long enough ladders or drills which aren't suited to thick barn walls) or are unsympathetic to the aesthetics of old buildings (e.g. fixing cables in very visible places because it is hard to drill through walls.)

Given where they live, rural consumers often deploy a number of 'workarounds' to cope with the drawbacks of their location, including:

- Selecting the mobile provider with the most reliable signal where they live or work;
- Using mobile phone signal boosters;
- For SMEs, using a number of different mobile phone providers for the places they travel to or have people working in;
- For SMEs, using mobile broadband dongles to supplement their fixed broadband service.

Individual SME IT managers, with more understanding of telecoms infrastructure, can on occasion take the opposite view. A small minority is aware that some rural areas (e.g. in Norfolk) have received fibre broadband earlier than some urban areas because of public investment.

4. An overview of key telecoms quality of service issues

4.1. How consumers understand telecoms quality of service

For consumers – both residential and SME – telecoms quality of service covers two elements: *service performance* (i.e. how good or poor the provision of the subscribed-to service is) and *customer services* (i.e. the experience of dealing with a retail provider’s customer services in relation to the subscribed-to service). In most cases, the telephone is the principal channel residential consumers and SMEs use to contact their service providers because they believe this is the quickest and easiest way to get hold of someone to help them with their issue (though this does not always bear out in reality). Other channels such as webchat and online portals are occasionally used for information-gathering but remain relatively underused by most consumers. In this sample, only a few individuals, principally IT managers in SMEs, are adopting new channels such as Twitter to make contact with their providers.

Overall, service performance is more important for consumers than customer services because that is the element they feel they are principally paying for; they simply want and expect the service to work. They judge service performance in terms of:

- Overall availability (i.e. whether or not a mobile or fixed network can provide connectivity at a particular location);
- Reliability – a consistently good service (e.g. a fixed line without an echo when used, a strong mobile signal for both calls and mobile internet, sufficient broadband speed to enable online tasks).

Service performance and customer services are closely inter-related. A problem with service performance can be exacerbated by a poor customer services experience. The reverse is also true: the perceived negative impact of a service performance issue can be significantly reduced by a good customer services experience.

4.2. The impact of poor telecoms quality of service on consumers

When consumers experience poor quality of service in telecoms, two factors are involved. First, time – how long the problem lasts (both before and after the consumer contacts their provider) and, second, the efficiency of the process when they contact customer services to resolve their issue. Therefore, a relatively major issue – e.g. the loss of broadband - will be deemed merely annoying if it is resolved (or resolves itself) quickly. On the other hand, a relatively minor issue – e.g. a billing query – will quickly escalate from annoying to something much more serious if the customer services experience is slow and cumbersome. Therefore, service provision and customer services are closely aligned: how the latter responds to the former makes all the difference in relation to the impact of the original issue on the consumer.

At its worst, poor quality of service combining a service provision problem with a poor customer services response can have a significant practical, financial and emotional impact on people’s lives, though the specifics differ between residential and SME consumers, as follows:

Impact on residential consumers

1. Original loss of telecoms service (impact is greater if loss is protracted):

- Disruption to family life (e.g. failure of broadband affecting all aspects of the household, from day-to-day living to family entertainment);
- Impact on education (i.e. children unable to complete homework without broadband);
- Effect on family relationships (e.g. teenagers complaining to parents about slow broadband or poor mobile phone signal);
- Feeling of isolation (e.g. unable to make and receive calls, no access to social media without broadband);
- Insecurity of not being able to make or receive emergency calls.

“Like I’m personally not a big internet user or WiFi user, but the wife and the iPad for the kids, you know, so it was more for them, you know.” (Residential, broadband)

“It’s their education. It’s a big thing for me... the lads... totally rely on it. It went before, that they had been doing work and it’s been cut off. It was like a twelve-page essay.” (Residential, broadband)

“My husband’s away quite a lot and I don’t drive so if I don’t have broadband I feel very isolated living where we do with three small children.” (Residential, broadband)

2. Process issues (impact is greater if process is protracted):

- Free time wasted;
- Considerable emotional energy/stress.

“Eventually it is resolved but, like, it’s through the persistence of the customer point-of-view, you know.” (Residential, broadband)

3. Process issues involving missed engineer appointments:

- Free time wasted or loss of earnings/wasted holiday allowance, if time taken off from work.

Impact on SME consumers

1. Original loss of telecoms service (impact is greater if process is protracted):

- Disruption to work life (e.g. loss of broadband resulting in loss of productivity and sales; loss of fixed line preventing retailers from using card payment machines);
- Impact on ‘brand’ (e.g. poor impression given to prospective and existing customers if fixed line or VoIP phones out of service).

“There was a fault with the office service. Fifteen people unable to work for a day and offshore unsupported.” (SME, broadband)

“We’re a letting agent so no one could phone us up to book any viewings. Eventually they could with a call divert system. We, luckily, have got a mobile phone and most of the tenants and landlords have got that as an emergency. So I was getting a lot of phone calls saying, ‘What’s going on? I can’t get through to you on the landline’ because it was basically saying that ‘the number you have dialled hasn’t been recognised’ like as though I hadn’t paid the phone bill.” (SME, fixed line)

2. Process issues (impact is greater if process is protracted):

- Individual working time wasted;
- Considerable emotional energy/stress, especially for those who are supposed to be involved in running the company.

“I spent about half a day sorting it out.” (SME, fixed line)

3. Process issues involving missed engineer appointments:

- Manager time wasted and loss of productivity and earnings (though few SMEs can calculate the true financial implications involved);
- Impact on scheduling of larger projects (e.g. new retail store delayed by failure to install new phone lines on time).

4. Loss of service and process issues affecting individual employee:

- In larger SMEs, there is the fear (at least) of serious problems potentially affecting the IT director’s reputation and career progression;
- In smaller SMEs, longer working hours involved in resolving problems and being distracted from core business activities.

“You don’t want a problem because it makes you look bad. You’re just expected to make everything work.” (IT Director, SME)

Impact on both residential and SME consumers

1. Reluctance to spend time contacting the provider:

- The result of poor quality customer services can be that they are reluctant to contact their retail provider about less important issues because of the time and energy the process involves, and will therefore accept an inferior service.

“To be honest, I put the phone call off for weeks and weeks because I knew what I was to go through if you ring them, you know.” (Residential, fixed line)

4.3. Consumers’ key requirements in relation to telecoms service performance

Consumers who participated in our research say that, in overall terms, telecoms services in the UK are generally reliable and – in relation to broadband and mobile – have significantly improved since the early days of these services at the end of the last century. The services they subscribe to generally work as expected or advertised every time they use them (i.e. broadband at the right speed, a 4G mobile signal, etc.) As this tends to be what is delivered by providers most of the time, this has become the key requirement for service provision for consumers – services that work as expected when used.

Consumers' expectations of service performance by service are as follows:

Broadband:

- A connection that is 'always on';
- A service that provides the advertised speed;
- A service that is fast enough to cope with the wide range of activities residential consumers and SMEs use broadband for today;
- A service with sufficient capacity to deal with multiple users to be online at the same time, whether that involves different family members or business employees;
- No significant buffering.

Mobile:

- A signal that is always available;
- A signal enabling users to make and receive calls (this is particularly the case at home where mobile phones are increasingly more widely used by consumers than fixed line phones) and, for those with smartphones, to access the internet and accomplish tasks;
- Good line quality when making and taking calls, including clarity, no dropped calls, no echo.

Fixed line:

- A service that is always available, with a clear line and no echo.

Of course, these constitute the ideal. While most consumers in our sample receive a functioning service (or thereabouts) most of the time, they can be reasonably forgiving if this is not always the case, particularly if some minor problems are occasional or short-lived. For example:

- Residential consumers can consider slower broadband at peak times as a fact of life;
- Rural residential consumers and SMEs understand that where they live or work can have an impact on their service performance because they are some distance from an exchange (for broadband) or their mobile coverage can be patchy;
- In SMEs, IT managers and directors who have more understanding of telecoms recognise that complex systems tend not to work faultlessly all the time.

4.4. Consumers' key requirements in relation to telecoms customer services

Consumers – both residential and SME – are looking for customer services that resolve any problems they have as quickly and efficiently as possible. To a greater or lesser extent, consumers see telecoms problems as something they want to remove from their 'to-do' list as painlessly as possible. There are three elements to the ideal issue- or problem-resolution process for consumers, these are:

1. Essential services

a. *Resolving the problem:*

- Fast resolution (from reporting to fix);
- Minimal customer effort/time involved (e.g. length, number of calls);
- Provider delivering the response they said they would (i.e. on schedule).

b. Provider taking responsibility:

- Good quality initial communication – including making them feel the provider has understood their issue, and understanding of how and when their issue will be resolved;
- Taking ownership of issue, including coordination of other parties, escalating issues to higher authorities if required quickly;
- Ongoing updates, getting back in touch quickly and when they say they would.

2. Essential skills

a. Diffusing the stress/taking the heat out of the problem:

- Showing empathy to the customer and recognition of the significance of the issue in their life
- Helpful, polite, efficient, not over-familiar (e.g. not asking questions about what the customer is doing at the weekend, what the weather is like with them, etc.)
- Scheduling repairs so they are convenient for the customer as far as possible

4.5. Residential consumers' expectations of retail telecoms providers' customer services

Even though most residential customers do not have to engage with their retail providers' customer services very often, their expectations of them are generally poor. This is either because of direct past experience or because they have otherwise heard negative perceptions. The ideal level of service set out in 4.3. above is often not experienced when they contact their retail provider, although experiences are highly inconsistent.

The general feeling is that retail providers have underinvested in their customer services and are not providing the slick and professional experience consumers require. There is now thought to be a gulf between the technological advancement and speed of the products and services providers sell and the often outmoded customer services they provide to support their customers (e.g. seldom providing automatic updates on the progress of an order or repair).

Moreover, telecoms providers' customer services are now believed to lag some way behind the leading-edge customer services that consumers often experience today in other markets, be that retail, banking, utilities and courier services. Many of these customer services are praised for their flexibility and proactivity, elements that are felt to be relatively rare in telecoms. They are also thought to use new technology more effectively, particularly in relation to customer updates.

A particular gripe of consumers is that telecoms providers do not appear to value or reward their custom – they seldom feel they have more clout with a provider the more products they have and suspect that providers make more effort gaining new customers than looking after existing customers.

However, residential consumers make two exceptions in relation to their providers' customer services, both of them delivering face-to-face service:

1. Engineers, who are often thought to display many of the qualities that are absent when dealing with providers over the phone, e.g. can-do attitude, flexibility, initiative and efficiency;
2. Mobile networks' retail stores – again, staffed by knowledgeable and helpful people who make sorting out any problem much easier than over the phone.

4.6. SME consumers' expectations of retail telecoms providers' customer services

For SMEs, expectations of telecoms customer services can be higher than those of residential customers (assuming the SME uses a business package: micro businesses, particularly sole traders working from home, often use residential telecoms packages and their expectations of their providers' customer services are the same as residential consumers). Business package users are usually paying more for their telecoms than residential consumers, and expect to receive nominally better customer services as part of the package (e.g. dedicated business contact number, dedicated service team including a consistent account manager, etc.) They also typically see telecoms as business critical and therefore make higher demands of the overall service.

However, not all are having their expectations met: they have been unimpressed with the calibre of their provider's business team, whose understanding of issues can seem lower than their own, or they have found that there is a constant turnover of 'dedicated' account managers. Ultimately some SMEs find the system is not fit for their demands and they engage the services of a third-party supplier to manage the relationship with their ultimate telecoms provider.

Like residential consumers, SMEs generally have positive feelings towards any providers' engineers they encounter during installation or repairs.

4.7. The role of quality of service in relation to switching

For residential consumers, quality of service plays a limited initial role in provider choice; it is the promise of the product or service (in terms of speed, capacity, coverage, etc.) that principally counts, along with the price. Quality of service is generally much less of a consideration because (a) consumers just expect their services to work, (b) they do not anticipate having to engage with customer services regularly, and (c) overall quality of service plays a generally limited role in providers' marketing communications. Overall, it is very hard for a consumer to evaluate quality of service issues at the outset, be that service provision or customer services. There is a general assumption that providers are all much the same – the only exception to this is the limited number of occasions where consumers have switched away from a provider for other reasons, only to come back because the quality of service experienced with the new provider was inferior.

Where quality of service can play a role in residential decision-making is in driving a consumer to switch from one provider to another: while the new provider's product will be the key driver, poor experience with the former provider's quality of service can also be a factor. These might be ongoing service provision problems or a particularly poor customer services experience, especially if it relates to resolving a service provision problem.

Among SMEs, quality of service can play more of a role in decision-making, though the product/value elements remain paramount. First, quality of service requirements (both in terms of service performance and customer services) are thought to be a more typical feature of the products SMEs take in comparison to residential consumers. Quality of service could well be more business-significant or -critical, so it is important to get this aspect of telecoms decision-making right. Second, larger SMEs with dedicated IT staff are more used to exploring the quality of service credentials of new providers, particularly as they often feature explicitly in providers' marketing communications. As a result, most business contracts contain details of service requirements with accompanying SLAs.

As with residential consumers, poor quality of service experiences can be a factor in the decision to switch provider for SMEs. However, some businesses are reluctant to switch provider because of the disruption involved, which is why they employ third-parties to resolve any service provision problems on their behalf, and shield them from any customer services issues.

4.8. ‘Best in class’ customer services in other markets

Among the brands often cited as having excellent customer services are Amazon, First Direct, Dyson, John Lewis, Halifax and Parcelforce. The factors cited as being strengths of some or all of these companies (i.e. the sorts of factors which impress) are:

- UK call centres;
- Phone answered by a person or limited, intuitive interactive voice-recognition systems (IVR);
- Offers to call back if they are busy (although actual delivery of this service can be patchy);
- Flexible scheduling of appointments and deliveries that do not require consumers to be present for very lengthy timeslots;
- Tracking functions and regular progress updates via email/text;
- Self-service apps (e.g. banking apps) which work well and save time;
- Proactive compensation (e.g. free delivery, free subscription periods, etc.);
- Upgrades/product evolutions without the customer having to ask (e.g. new debit cards with contactless functionality; improved spec TV receivers; Apple Pay compatibility).

4.9. Perceptions of the quality of service offered by different retail telecoms providers

Among residential and smaller SME consumers, the consensus is that all retail providers are very similar, generally providing a more or less reliable service performance, but are less consistent when it comes to customer services. In addition, different customers with the same retail provider can have quite different experiences when dealing with the provider’s customer services. Larger SMEs hold similar views though a widespread feeling, among these more experienced and knowledgeable consumers, is that quality comes at a price and that ‘you get what you pay for’. This is why value is often more important to this audience than absolute price – some SMEs actually talk of being suspicious of the cheapest quote.

4.10. Coordination issues between retail providers and between retail providers and Openreach

Individuals give examples of where coordination between Openreach and retailers may break down or could be improved:

1. Poor communication between retail provider and wholesaler about both the details of the installation required and the schedule of the visit; and
“They installed the new phone line in the empty retail unit next door to ours. How he didn’t see our unit was the one to put the line in when there were people there installing all the new fixtures, God knows. You’d have thought it would be pretty obvious.” (SME, fixed line)

2. A broadband upgrade was coordinated between retail provider and wholesaler but the customer was informed there was 'no room' in the box at the end of the street – the customer was without broadband for four days while the issue was resolved between the two parties and they did not receive their upgrade for three months.

Residential customers experience other forms of coordination breakdown between retail providers more widely than SMEs, although such coordination problems are infrequent. Examples given include:

- On switching provider, one residential customer discovered that their direct debit with their old provider remained in place well after the switch, resulting in their being out of pocket by over £100, a situation they had to resolve themselves;
- Smartphone and tablet users on occasion complain that, if they have a problem with their device and contact the retail provider with whom they have the contract, they are redirected to the device manufacturer to resolve the problem. Therefore while the contract is with a network, the network seems to have no responsibility in relation to the device, despite having sold it to the customer as part of the contract;
- With triple-play packages, there can seem to be a lack of coordination between the telecoms division of the retail provider and the TV division. For example, consumers are often disappointed when they first subscribe to a triple-play contract that the switching-on of the different elements is often not synchronised, so the TV can on occasion lag somewhat behind the telephone and broadband components.

Among SME customers, particularly in larger businesses, awareness of coordination issues is often higher, because SMEs tend to have a better knowledge of the different parties involved in the provision of telecoms services and the occasional breakdown between these parties. In addition, during the installation of a new line there can be numerous parties to coordinate prior to further work being carried out. Mitigating against the problems of coordination is one of the reasons larger SMEs employ third-parties: they are seen to have more clout with individual providers when there is a breakdown.

Some smaller SMEs are more conscious of the possible drawbacks of the involvement of two separate suppliers and are therefore more inclined to use BT Retail as their retail provider, assuming that the brand's apparent association with Openreach will mean that their service is less prone to breakdown. Some larger SMEs would like to have direct contact with Openreach so they can chase them up directly when problems occur.

4.11. Consumer compensation issues

Compensation rights are better understood among SMEs than residential consumers, particularly larger companies where there is an IT/comms director on the staff, they are using business packages or they are engaging the services of a third-party.

Compensation clauses play a significant role in the negotiations larger SMEs have with potential suppliers, as well as the resulting SLAs and service level guarantee payments. (There is some debate, however, about whether the level of compensation contained within SLAs reflects the disruption felt by businesses when there is a problem; SMEs also think it is right that providers feel a degree of 'pain' when things go wrong.) For some SMEs, an additional benefit of using a third-party is

that the third-party may have greater clout with the retail provider when it comes to issues like compensation.

The picture is very different among residential consumers, most of whom do not think that they had experienced situations where they may have been eligible for compensation and were unaware that it could have been available. Some assume it could come into play in the case of a lengthy loss of service. Consumers say that, unlike rail companies and airlines which to some extent publicise the compensation available to consumers for delays, telecoms providers are not at all explicit or transparent in this area. Consumers do not know what they are entitled to or the process involved in claiming compensation.

Some individual residential consumers have received compensation for major problems they have encountered, but this is on the whole because the provider involved has provided the compensation without being asked. This is deemed excellent service, but also considered to be an imperative on the part of the provider.

Given their lack of experience in compensation matters and the fact that providers are largely silent about the issue, consumers are not confident about specifying what might be reasonable compensation sums for different service failures. For some consumers, simply paying back the actual cost of the service on the days when any issue occurred could be appropriate, though this could result in the payment of a sum thought by the customer to be derisory, particularly if they have had to put in significant effort to receive it. In addition, there is some feeling that compensation should apply on more occasions than just a major or protracted loss of service – to include occasions when a problem has had a significant impact on consumers' home and work life, as well as the quality of their experience when contacting customer services. If the process of resolving the problem involves having to ring customer services repeatedly, being passed from one call handler to another or repairs not happening as promised, then the customer feels entitled to compensation.

Similar to customer services issues, the telecoms industry is thought to lag behind other markets in relation to compensation. For example, consumers say that pay TV providers (either those which consumers subscribe to as part of a telecoms package or as a standalone service) sometimes offer things like free film subscriptions for 6 months if a customer has had a prolonged loss of service. Often this compensation has been triggered by the customer threatening to leave, but sometimes it is given automatically, which is very impressive to the consumer.

4.12. Willingness to pay for 'superior' customer services in telecoms

Among most residential and smaller SME consumers, the concept of paying more for an enhanced level of customer services does not appeal. It is considered a matter of principle that telecoms providers should have very good quality customer services as part of the overall service, the same as they have come to expect in other markets. There is also some concern that paying a premium price may not in reality deliver a premium service.

Nevertheless some consumers might be persuaded to pay more for quicker service at the time of need, even though many of these would resent the charges and consider them the 'thin end of the wedge'. For example, paying to jump higher up the queue on the phone or paying a one-off fee for a same-day engineer visit might be acceptable for an issue considered to be an emergency. According to residential consumers, 'emergencies' could include needing broadband as soon as possible

because one of their children has to submit a school project by a particular deadline or because they are working from home that day and need to keep in touch with clients.

Only a small number of individuals might be persuaded to pay for a subscription-based 'gold service' package. These tend to be more affluent consumers, people who already pay for superior service packages in other markets (e.g. Amazon Prime) and, in particular, those who regularly work from home and can therefore justify an additional service charge as a business expense.

There is no quibble for charging consumers for material additional services (e.g. an engineer visit to install a product that most customers are expected to self-install.)

Larger SMEs are also not certain about the concept and again see the idea as morally suspect, particularly as many are paying extra for business packages which are meant to come with enhanced customer services provision as standard. Those with third-party arrangements do not feel they need the option because they have SLAs in place to deliver a superior service as standard. But for some SMEs, particularly if they do not have third-parties and SLAs, for an urgent problem they consider it worth paying extra to resolve it quickly.

4.13. Consumer tactics for overcoming the shortcomings of retail telecoms providers' customer services

Consumers can adopt 'workarounds' when dealing with providers' customer services. These are driven by previous poor experience and a belief that current customer services processes often do not work. These include:

- Calling their provider's sales line when they have a problem, because they consider that this number is likely to be answered more quickly than the provider's main customer services number;
- Calling their provider's cancellation line: again, they believe that the number is likely to be answered quickly and often gives them more clout to get their problem sorted fast;
- Writing to their provider's CEO is sometimes thought to be the best way of getting the consumer's voice heard (a small number have even taken to Twitter for the same reason);
- Threatening to leave, via customer services, is believed to get problems sorted more quickly and may also encourage the provider to give them a better deal or some kind of compensation.

"The only place I could get a signal on my mobile at home was in the toilet, honestly, and when I complained they said there wasn't anything they could do. In the end I said I was going to cancel my contract and the guy said he'd send me a signal booster for free which works great." (Residential, mobile)

5. The details of telecoms quality of service in relation to key service areas

Outlined within this section is a breakdown of the residential and SME consumer’s ideal service experience within each of the four service areas explored in the research – installations, repairs, reliability and other reasons for contact. In the case of installations, repairs and other reasons for contact, residential consumers’ and SMEs’ priorities are shown in a grid which describes, in sequential order, the different components of the customer services contact involved (e.g. quality of installation, follow-up, etc.) with a description of the ideal response to each component. (The participants chose what they considered to be the components of each form of contact with the provider.) The following colour codes illustrate to what extent each component is a priority for consumers:

HIGH PRIORITY
MEDIUM PRIORITY
LOW PRIORITY

In addition, examples of poor customer service, as defined by consumers, have been included. Each of the four service areas is covered in turn. There are a number of elements relating to both poor and good service which are applicable to all four service elements.

5.1. Service installations

These are contacts where the consumer arranges the installation of a new product or service from their retail provider. Traditionally it involved the visit of an engineer to fit a device or cabling, though this has become less common over time, particularly for residential consumers. Today it is typically a self-installation task (e.g. setting up a new broadband router) or the installation may be done remotely (e.g. switching on an upgraded mobile phone tariff by a network).

Installation is an area where retail providers’ performance tends to be rated more positively, particularly in the initial stages preceding any engineer visit (assuming one is involved). At the initial stages, the emotions underlying the scenario tend to be quite positive, especially among residential consumers, because usually they are not trying to sort out a problem but organise the arrival of a new product or service. The fact that there is a sales element to the process also helps. According to consumers, retail providers’ customer services relating to sales tend to be better than those relating to problems – the phone is answered quicker, the call centre is typically in the UK and the overall process and the staff involved are efficient. Often the installation scenario takes place during the first contact the consumer has with a new retail provider and therefore, they report, the provider is on its ‘best behaviour’.

There are two key elements to a successful installation customer services experience. First, the initial call. In addition to speaking to an efficient member of staff, consumers – particularly less experienced residential consumers – would like a degree of advice about the product they think they want and assurance that it will actually suit their needs and their specific circumstances. Product knowledge and clarity of explanation on the part of the call handler are therefore vital. A degree of flexibility in relation to the scheduling of any engineer visit required is also important, particularly for SMEs. The ideal is that the provider works round the customer, not the other way round.

Second, the installation process itself. Time-keeping is essential, with the work carried out as scheduled in the original call. There is an increasing expectation from consumers that they'll receive updates (by text or email) narrowing down the arrival time of an engineer, ideally the night before, particularly if the original window they were given was quite wide. It is also vital that consumers are given updates on any delays or changes to the timetable. For some consumers, giving engineers the ability and permission to provide updates themselves (e.g. texting 'I'll be with you at 2.30' or calling half an hour before they arrive to ensure the customer is at home) would make the process more positive.

In addition to time-keeping, consumers consider the following equally important for installations:

- The engineer turns up with the right product and the right tools to install it;
- They display a degree of flexibility and common sense about where the product is installed in the home (e.g. cables and junction boxes placed discreetly and sympathetically (in relation to the building) as far as possible);
- They test the installed product properly and do not leave until everything is working; and
- They clear up.

The consequences of a poor installation process range from annoyance and disappointment if the promised schedule slips, through to a more serious impact if the consumer has to get directly involved in rectifying any problems. While these more serious issues are not commonplace, the impact can be fairly significant in terms of time and cost for the consumer. Examples include:

- Having to contact (and re-contact) a provider to reschedule an engineer visit, as a consequence of the engineer not turning up or arriving with the wrong kit or tools;
- Having to pay for a re-installation when an initial job is faulty;
- Being left without the service for a period of time because the new installation has not gone to plan and, meanwhile, the old service has been switched off;
- Having to take further time off work (residential consumers) or rearrange staff cover (SME consumers) if an engineer does not turn up as scheduled; and
- For SMEs, installations that do not run on schedule can have a knock-on impact which delays the move to an office or the launch of a new service.

There can also be emotional consequences from problematic installations: consumers are often very disappointed if the new product or service they were looking forward to does not arrive as scheduled or work as promised.

5.1.1. Self-installation

While installation involving an engineer may still be a feature of more complex SME-related telecoms, it is no longer a routine event in the lives of residential customers. UK housing stock is increasingly 'wired up' and so the only engineer installation that residential customers typically experience relates to the installation of a satellite or cable television service or moving between ADSL and cable. Customers often perform self-installs of broadband and mobile 'installation' is remote.

Therefore, for many residential consumers, installation now means something they do themselves, particularly in the case of WiFi routers. Consumers typically have a good experience when it comes to installing routers themselves, and the process is seen to have improved greatly since the early days of the internet. Devices are genuinely 'plug and play' and consumers are no longer required to adjust

the settings on their computer to get the device to connect, a process which often previously required talking to an engineer to complete successfully.

“By the time my husband got back from work, I’d set it up. He couldn’t believe it... neither could I!”
(Residential, broadband)

According to consumers, self-installation of routers works well today because:

- The devices are despatched quickly, particularly when the previous router is faulty and needs replacing. If there is a complaint, this can be when consumers feel the new router has not been sent out immediately, as it is usually expected to arrive the next day;
- Routers from most providers generally now come in boxes that will fit through the letter box and do not need to be signed for;
- When this is not the case, customer services are flexible and organise for the new router to be delivered at a time when the customer is in and can take delivery
“My wife wasn’t going to be in on the first day they said they could deliver it, so they delayed it till the day after.” (Residential, broadband); and
- The instructions are clear, both in terms of which cables plug into which sockets, how to link devices to the network, what the lights on the box signify and how long the device takes to deploy.

Consumers switching broadband provider or moving home are sometimes disappointed to discover that, having installed their new router, they cannot use it immediately to access the internet; they had not been informed by the call centre that their new service will not actually be switched on for several days.

For individual residential consumers, mobile phone self-installation can be more problematic initially, though easily enough resolved either over the phone or in the store where the product was bought. (Mobile phone retail providers’ stores are in fact widely praised for the calibre of their staff and have an advantage over other types of customer services by being face-to-face.) Often these problems are not service provision-related but involve synching issues, such as transferring contacts from a previous phone, copying previous settings from the old phone or help needed to work the new device.

5.1.2. Service installations – the relative importance of different customer services elements

Residential and SME consumers provided clear details of the different requirements they have at each stage of the service installation process, establishing the high, medium and low priority levels of provider service they need. The service levels and priorities are outlined in the diagram overleaf.

Service installations:

	Residential	SME
Getting through to someone who can help <i>(Ease of finding the number; time taken to speak to someone; IVR performance)</i>	MEDIUM	MEDIUM
Quality of first line support <i>(Understands customer's needs; ability to communicate; quality of conversation)</i>	HIGH	HIGH
Experience re-contacting/follow-up calls <i>(Whether need to re-explain issue; overall time taken)</i>	LOW	LOW
Speaking to 'right' person <i>(Quality of communication; advice given)</i>	HIGH	HIGH
Time taken from order to completion of order <i>(Explanation of process; speed of order; flexibility)</i>	MEDIUM	HIGH
Flexibility of engineer appointment <i>(Flexible timings; short timeslots; synchronisation of other services; updates)</i>	MEDIUM	HIGH
Quality of installation <i>(Arrival on time; flexibility re: building; professional manner; everything working before departure)</i>	HIGH	HIGH
Quality of set-up: mobile phones <i>(Ease of process; quality of support if required)</i>	MEDIUM	MEDIUM
Quality of set-up: self set-up of broadband <i>(Quality of instructions; ease of process and time taken)</i>	HIGH	HIGH
Follow-up <i>(Whether it occurs; quality of follow-up)</i>	LOW	LOW

For residential consumers, the priorities for an installation are good quality personnel when ringing to arrange for the new product or service, including getting through to someone who can provide proper advice relevant to the individual consumer's needs. Where relevant, a successful engineer visit is obviously also a priority, with the engineer turning up on time and completing the job properly with everything working properly before departure. In the case of self-installations (e.g. wireless routers), making the process as easy as possible and ultimately successful are vital to residential consumers.

SMEs have similar priorities to residential consumers, though they place more importance on timings and flexibility. The installation of new products and services is often business critical and therefore they need things to happen as quickly as possible. They also strongly demand flexibility in relation to scheduling to take into account last minute changes in their timings, particularly in the case of installations coinciding with other works (e.g. new store openings, office moves, etc.).

5.1.3. Examples of poor service installation experiences

Two examples of poor installation experiences are outlined below. The first relates to the installation process, and the second relates to communication around the installation process. These give an illustration of occasions where service is seen to break down.

1. Residential consumer – broadband/pay TV:

According to the consumer, all parts of the installation process up to the engineer's visit, such as scheduling, etc., had worked well. However, on the installation day, the engineer fitted very obtrusive and ugly cabling around the front door without consulting the consumer, then refused to change it to a more discreet position on the house. The consumer ended up having to buy new cabling and pay for another engineer unrelated to their retail provider to complete the job as they wanted it.

2. SME consumer – broadband:

The consumer had moved into new business premises and wanted to transfer two fixed lines and broadband from the old offices – a process that the provider said would take a few days, but in reality took six weeks to finalise successfully. The main issue related to broadband, which was not installed correctly, forcing the consumer to use the WiFi of a neighbouring business as a 'workaround'. This faulty installation meant the consumer had to ring the provider repeatedly to try and resolve the issue, a process that usually involved them having to recount their problem from scratch on each occasion. What made matters worse was another department from their provider regularly calling them up to see if they were happy with the installation process they had originally ordered.

"In the end I said to them, 'Look, I've spoken more to you in 6 weeks than I have done to my wife', and they're all under different account numbers, they're not all under one roof... it was a nightmare."
(SME, broadband)

5.2. Service or repair when things go wrong

The process of resolving a problem or organising a repair in the case of a faulty service is typically emotionally charged from a consumer's point-of-view. While SMEs feel their business depends on the quick resolution of a problem, residential consumers increasingly feel the same way in relation to their home and family life. This is a customer services scenario where the quality of the customer services experience makes all the difference to the impact of the original problem – a smooth process reduces the problem; a poor experience significantly exacerbates it.

The most important elements for a successful customer services contact in the event of a fault or repair are that the process of resolution is easy from a consumer perspective and that the actual repair happens as quickly as possible.

Making the process easy for the consumer is not only about fixing the problem. It also extends to their strong desire to get the issue off their 'to-do' list as quickly and painlessly as possible, and involves:

- Getting through to someone who has the skills to help (either directly or by knowing who to redirect the caller to) relatively quickly;
- Speaking to someone who understands the problem, understands the significance of the issue to the consumer and the importance of resolving the problem quickly;

- Not being redirected a number of times to different customer services operatives, none of whom seem to be able to help and/or who need to hear the consumer repeat their problem from scratch;
- For SME IT directors (or technically inclined individuals), not being taken through a scripted process to diagnose the source of the problem when the caller has already investigated the obvious things before calling (e.g. checking filters for a broadband problem, resetting the router). For some SME IT managers/directors, there is an expectation that call centre staff, especially those in dedicated business teams, should know they are talking to people with good technical knowledge. At the very least, asking what the caller's level of technical knowledge is would be useful;
- The provider taking ownership of the problem and for coordinating its resolution;
- Not having to ring back to achieve progress on the problem and, especially, not having to explain the problem from scratch on each occasion – in other words, the logging/recording of details of the consumer's problem needs to be accurate and complete;
- The provider giving accurate and viable timescales for the repair so the consumer feels responsibility has been taken and a degree of personal control restored;
- If possible, the provider helping the consumer with short-term solutions or 'workarounds' (this is particularly important with SMEs.)

With the actual repair, particularly if it involves an engineer visit, the priorities are fast resolution and managing expectations. Managing expectations can be more important for some consumers. In particular, the greater expertise of IT directors/specialists in larger SMEs means that they understand the sometimes complex nature of getting repairs organised between providers and wholesalers, and are therefore more tolerant of the time this may take. What they need as a priority is an accurate and fixed schedule of when the problem will ultimately be resolved so they can manage their business accordingly.

Managing expectations involves clear communication at the time of the initial call, plus regular updates (by phone and/or text) on progress, particularly if there is some slippage in timings because the problem is more complicated than originally diagnosed. (IT directors in SMEs can be more tolerant about delays than residential consumers: they understand the complexity of telecoms systems and acknowledge that a problem may take some time to isolate and fix.)

Finally, any engineer visit needs to be on time and successful in terms of fixing the problem, which includes bringing the right equipment to the visit. An additional element of good fault resolution is if the provider or the engineer follows up the repair with a call to the consumer to check that the repair still holds good and that the fault has not returned.

"[The engineer] came back a couple of days later, saying that he was sort of in the area and, like, wanted to check that our broadband was still working. To me, that was doing it properly." (SME, broadband)

For consumers, annoying or irritating experiences when engaging provider customer services about service issues or repairs relate to how efficient or not the initial contact is: a delay in the phone being answered, being passed from one call handler to the next before there is any sense of progress, etc. all contribute to annoyance. These negative factors are thought to be central to the experience consumers go through with offshore call centres, details of which are contained in section 5.2.1.

In an ideal world the retail provider's customer services staff need to be able to gauge the caller's level of expertise and manage them accordingly. For example, being aware that asking a non-IT literate person to take the 'box' (i.e. the network terminating equipment) off the wall can be stressful

and confusing. Conversely, insisting that someone who is very comfortable with technology switch their router off and on again can be extremely irritating.

5.2.1. Call centres

Some consumers have negative feelings about their provider's call centre that apply regardless of the physical location of the call centre. While some consumers acknowledge they have sometimes received a good service from call centres (particularly in relation to sales-related matters), they are routinely thought to be the worst aspect of dealing with customer services when things go wrong, for the following reasons:

- Slowness in answering the call;
- Entirely scripted responses, which mean that the operative does not properly take into account, or respond to, the specifics of their issue – it can feel more like dealing with a computer than a person at the end of the phone;
- More knowledgeable consumers particularly resent being taken through a multiple-stage process of isolating a problem (often several times over) when they themselves have already ruled out the obvious possibilities;
- Among SMEs, IT directors/managers are sometimes not authorised to speak to the operative because they are not the named account holder – often this is the financial director (FD) or MD of their company, who may not be in when they call, work from another office or, in the case of multinationals, be based overseas;
- The lack of genuine knowledge displayed by operatives – some consumers suspect that operatives have to deal with calls about a wide range of markets, not just telecoms;
- The lack of empowerment on the part of the operative – they cannot or are not allowed to use their experience or initiative. At best this means that callers often have to be referred to a superior, which further slows the process and delays a satisfactory resolution.

Many consumers who participated in our research complain in particular about *offshore* call centres used by their provider, especially in emergency situations such as faults or repairs; they are often a key driver in an SME's decision to use a third-party to deal with their telecoms providers and issues. The key criticisms of offshore call centres are:

- Poor quality phone lines – consumers complain that they often struggle to hear the customer service staff, or are fearful that the line will drop and they will have to start the contact process again and explain their problem from scratch;
- Mutual comprehension difficulties because of accents – some consumers with UK regional accents say that offshore call centre staff often cannot understand them, while they cannot always understand the operatives;
- Limited cultural understanding from the operative – consumers resent having to spell out place names and dislike the over-familiar tone that some call centre staff adopt to 'bridge the gap'.

The result of all of the above factors can exacerbate the consumer's sense of having no control over the situation.

Some consumers believe that providers only deploy offshore call centres to cover UK out-of-office hours. Therefore, they deliberately restrict their contacts to 9am to 5pm UK time in the belief that they are more likely to be answered by a UK call centre.

Despite these complaints it is also the case that some overseas call centre experiences are good: consumers talk about being put through (by a UK-based operative) to an overseas technical specialist or engineer who is able to talk them through the process needed to resolve an issue, even ‘taking over’ their computer/phone on occasion to fix the problem for them.

5.2.2. Service or repair when things go wrong – the relative importance of different service elements

The diagram below highlights the relative importance of the different service elements involved in fixing a fault or repair from both the residential consumer and SME perspective. In this case the relative importance of the elements is the same for both groups (even though the absolute importance for an SME may be greater in terms of the effect the fault has on its ability to do business).

Service or repair when things go wrong:

	Residential	SME
Getting through to someone who can help <i>(Ease of finding the number; time taken to speak to someone; IVR performance)</i>	MEDIUM	MEDIUM
Quality of first line support <i>(Understands customer’s needs; ability to communicate; quality of conversation)</i>	HIGH	HIGH
Experience re-contacting/follow-up calls <i>(Whether need to re-explain issue; overall time taken)</i>	MEDIUM	MEDIUM
Speaking to ‘right’ person <i>(Speed of problem diagnosis; quality of communication)</i>	HIGH	HIGH
Time taken to resolve problem <i>(Overall speed to resolve; how well process is explained)</i>	HIGH	HIGH
Flexibility of engineer appointment <i>(Flexible timings; updates)</i>	MEDIUM	MEDIUM
Quality of engineer visit <i>(Arrival on time; professional manner; resolves problem in full)</i>	HIGH	HIGH
Follow-up and compensation <i>(Offered by provider proactively following problem resolution)</i>	MEDIUM	MEDIUM

For both residential consumers and SMEs, the priority elements of service repair are quality of response (in terms of the calibre and effectiveness of personnel in call centres and engineers on the ground) and speed of response (i.e. ensuring the repair is carried out as quickly as possible, with the customer fully informed of progress along the way).

5.2.3. Examples of poor service or repair experiences

1. Residential – fixed line

The call to arrange repair of a faulty fixed line was initially successful, with a good call handler and an engineer visit conveniently scheduled for the next Friday, which involved the consumer having to take a half-day off work. The engineer failed to turn up on the Friday (without warning). However, he did eventually arrive the following Monday and resolved the problem. The consumer needed to take an additional half-day off work. The retail provider was apologetic and offered to reimburse the consumer, but they were not certain whether this ever happened and did not have the energy to follow-up.

“I was annoyed because, like, I’ve wasted half a day of holiday. That was annual leave, really, a lot of money. I think they said they were going to reimburse me but they didn’t.” (Residential, fixed line)

2. SME – fixed line

A faulty line meant that the consumer – a micro business based at home – had no broadband. The provider diagnosed that the problem stemmed from the house, rather than the line, and arranged for an engineer to visit. As the timescale was too long for the consumer, they arranged for an independent engineer to visit earlier. The engineer did not diagnose any problems within the house (i.e. the problem related to the external line) which triggered a back and forth process between consumer and retail provider. Eventually after two weeks, the retail provider admitted that the fault was in fact due to the line.

“I couldn’t do anything. It was really frustrating but they were really, really crap, actually, because they kept saying, ‘there’s no problem on your line’ and evidently there was. Eventually they said ‘Oh, there’s a problem on your line.’ I was, like, ‘yes... I know.’” We moved [retail provider] afterwards because everything was going via (them) at the time and it was just really, really rubbish.” (SME, fixed line)

5.3. Service performance

Good reliability is invisible, but poor reliability can be one of the most significant causes of frustration when it occurs, as the increasing utility-like status of telecoms means that consumers expect services to work every time they need them. Consumers have slightly different expectations of reliability depending on the service involved and this to some extent governs if and when they contact their provider with issues.

Location also plays a part in reliability, according to consumers, with rural consumers sometimes more sanguine about intermittent reliability issues than their urban counterparts. They realise that occasional slowness of broadband speed is sometimes a feature of country living/working.

For broadband:

Since it is the most utility-like of telecoms (i.e. it is ‘piped’ into the house or business premises and is the facilitator of consumers’ connected lives), consumers will tolerate only very occasional periods of

'down-time'. The ideal would be for providers to inform their customers proactively if there are problems in the consumer's area, as well as repair them as quickly as possible. Proactive communication of any issues is particularly important for SMEs.

There is a second reliability issue relating to broadband: speed, in particular a service which consistently runs at the speed and with the capacity advertised when initially subscribed to by the consumer. Speed and capacity are particularly important in larger residential households with multiple devices and in businesses which routinely need to send and receive large files (e.g. creative industries).

For mobile:

The key requirements and issues are consistency and quality of signal in areas where people live and work. It is a particular frustration when the signal at home is poor (but good everywhere else nearby) because the mobile is increasingly the first phone consumers turn to when making a call at home.

For those with 4G, receiving this service consistently and as advertised is especially important, as they can otherwise feel they are not getting the service paid for.

For fixed line phone:

For most people today, the fact that the fixed line phone seldom has any reliability issues, coupled with its decreasing importance in their lives due to mobile and VoIP substitution, means that any issues are less important than they once were, though fixed line phones continue to play a central role for older residential consumers. (Of course, the line itself is still vital as a means of accessing internet services and specialist items like card payment machines for retailers.) In terms of the phone aspect only, the chief reliability issue is having no noise on the line.

Most consumers are tolerant of occasional, short-term reliability issues with their telecoms services – they are irritating but people can live with them (e.g. slow broadband at peak times, broadband router that occasionally needs to be rebooted). Some consumers will live with minor reliability issues as they want to avoid having to contact the call centre. Where an occasional reliability issue becomes more serious is typically when it is bad or sufficiently consistent to require the consumer to contact customer services.

Reliability issues become more serious still when the consumer has to contact customer services time and again to report them, as a result of an ongoing problem. The most serious issue is when there is a total loss of service for a significant period of time.

Bound up with reliability is how effective retail providers are in dealing with the issues – how they handle the customer call and how they respond to the issue. Once again, a relatively minor issue like noise on the line escalates quickly to something more serious if the consumer has to contact their provider several times to report it; a complete loss of broadband seems much less serious if the problem is resolved within the hour and the provider keeps the consumer regularly informed on progress.

5.3.1. Examples of experiences of poor reliability

1. Residential – broadband

The consumer knows when there is a reliability problem with their broadband because their PlayStation suddenly stops and freezes. Ongoing reliability issues with the service mean they have to turn off their router and change the channel settings about three times a day. Despite repeated calls to their provider, they have been unable to help and the consumer is left wondering if, as a rural consumer, they simply live too far away from the exchange.

2. SME – mobile

The consumer's mobile phone regularly dropped its signal. When they called their provider they were told this was due to 'cell breathing' where too many users in a specific area use the same mast, resulting in their range getting shorter. Ultimately the provider said there was nothing they could do and recommended they find another network, allowing them to leave their 24-month contract without a penalty.

5.4. Customer service when contacting the provider for any other reason

Consumers classify the need to contact their provider for other reasons in two ways: urgent issues and minor issues.

Urgent issues typically include major money-related reasons such as a large and unexpected charge on a bill (e.g. unexpected roaming charges or premium rate calls on their mobile which they may not have realised they had incurred) or an unexpected change to their subscribed-to package. These issues are similar to fault resolution in terms of emotional 'heat' and consumers expect their retail provider to deal with them with a similar level of urgency.

Minor issues have much less emotional significance for consumers and typically include account admin issues, such as the need to change a billing address or a general enquiry about a new service. They can also include financial matters, though involving small amounts of money. Expectations of customer services in these situations are generally less exacting – consumers just need their query to be dealt with efficiently and in as short a time as possible. For these issues, the consumer can often put off getting in touch so it falls to the bottom of their 'to-do' list – they are keen therefore that it is resolved there and then once they do get in touch. In fact, some of these reasons for contact are routine issues that consumers – particularly SMEs – would be happy to resolve themselves via an app or portal.

Given the similarity between urgent reasons for contact with service or repair issues, full details of the ideal customer services response can be found above in section 5.2. The most important elements for this kind of customer services contact are that the process of achieving resolution is easy from a consumer perspective and that the problem is resolved as quickly as possible. Therefore getting through quickly to a person with authority to act and who displays empathy and urgency are essential. At the same time, getting the matter cleared up without an argument also helps to take the sting out of the issue. The provider taking responsibility helps minimise the sense of personal stress as the consumer is then confident it will be resolved. This might also be a situation where proactive compensation – if there has been a mistake by the provider – would be appropriate and would typically be deemed excellent customer service by the consumer. These urgent reasons for contact are again situations where the customer services experience makes all the difference to the ultimate impact of the issues to the consumer.

“When I moved into my new house I asked for my new number to be ex-directory. I kept getting cold calls asking for ‘Joan’. I had to ring (the provider) time after time about it, and they could never do anything about it. In the end they had to give me a brand new number – the number they gave me first time hadn’t been ex-directory with the previous owner, which explained why someone had my number.” (Residential, fixed line)

With more minor issues, the priority is to get the job done as quickly as possible, to avoid things escalating to something more significant. In these situations, consumers want:

- To get through quickly to the right person who knows what to do and has the authority to resolve the issue;
- Not be passed from operative to operative several times;
- If transferred, not to have to repeat their issue from scratch; and
- Confirmation that the issue has been resolved.

5.4.1. Webchat and its role in consumers’ contact with retail telecoms providers’ customer services

The telephone remains the principal channel for consumers when contacting their provider’s customer services. However, individuals sometimes also use webchat channels, especially for more minor issues.

Webchat is thought to be a quick and convenient channel for some issues, particularly those relating to sales issues, where the customer only needs information on new tariffs or possible upgrades. Some consumers suspect that webchat channels are in reality manned by a ‘robot’ that merely responds to keywords, rather than by a human being. They therefore feel the channel is not appropriate for problems that usually require a response based upon a consumer’s specific needs or circumstances. In addition, when there is a problem that needs fixing immediately the consumer is ideally looking for a degree of personal reassurance that the problem is being dealt with, something that a computer can rarely provide.

There are more technically knowledgeable individual consumers who have sometimes used webchat to report a problem (e.g. slow broadband) and to see whether it is an issue that other customers in their area have experienced. They have found it a quick means of getting an initial answer and also like the fact that the channel provides them with a printable record of the contact.

Larger SMEs are often using web based portal services to interact with providers about more minor issues, for example, ordering new handsets, billing issues and so forth. This is seen as an efficient way of avoiding having to call.

5.4.2. Customer service when contacting the provider for any other reason – the relative importance of different service elements

Shown in the grid below are the different service elements in relation to minor issues. Urgent issues need to be dealt with in the same urgent way as service and repair issues, so please refer to the grid above in section 5.2.1.

Contacting the provider for any other reason:

	Residential	SME
Getting through to someone who can help <i>(Ease of finding the number; time taken to speak to someone; IVR performance)</i>	MEDIUM	MEDIUM
Quality of first line support <i>(Understands customer's needs; ability to communicate; quality of conversation)</i>	HIGH	HIGH
Experience re-contacting/follow-up calls <i>(Whether need to re-explain issue; overall time taken)</i>	MEDIUM	MEDIUM
Speaking to 'right' person <i>(Understanding issue; quality of communication)</i>	HIGH	HIGH
Time taken to resolve problem <i>(Overall speed to resolve; how well process is explained)</i>	MEDIUM	MEDIUM
Follow-up and compensation <i>(Offered by provider proactively following problem resolution)</i>	LOW	LOW

For all consumers, the priority is to get the minor issue off their 'to-do' list as quickly and efficiently as possible, hence the principal requirement for effective, knowledgeable personnel throughout the contact.

5.4.3. Examples of poor customer services experiences in relation to urgent issues

1. Residential – mobile phone

The consumer was confused about which bank account their monthly direct debit for their mobile was attached to. They contacted their retail provider because they were worried there would not be enough money in the right account and they would be cut off. They had to phone a number of times and, on each occasion, were passed from person to person and had to explain their situation afresh each time. Nobody has been able to help them and the issue remains unresolved.

“Every time I speak to someone I have to explain the whole thing again...” (Residential, mobile)

2. SME – fixed line and broadband

The issue began with the SME receiving a letter from the provider, on two occasions, saying that someone wanted to take over the business's phone line. On both occasions, the SME contacted the provider who reassured them that the letters were a mistake and that their service would continue as normal. In reality, the SME *did* have its line taken over and therefore lost its fixed line phone and broadband service. The provider set up a temporary call-divert service and emergency line which took a number of days to come into operation. The overall response of the provider caused significant problems for the SME.

“The website was up, so I didn't care about that, and I fashioned together my iPhone to act as a hotspot. So we got online but it was an absolute bloody disaster.” (SME, fixed line and broadband)

5.4.4. Examples of poor customer services experiences in relation to less significant issues

1. Residential – broadband/fixed line

The consumer made a routine enquiry about what options they had if they changed their package. It was a cumbersome, lengthy process involving complex IVR, being transferred multiple times and having to start their query from scratch every time. They eventually got the answers they needed but felt frustrated about how inefficient the process was.

“I find it a bit difficult trying to get through to the right option for what you're ringing for you know. You explain your whole situation and they'll go, 'hold on... we'll put you through to someone else. You'll have to relay the whole thing to them, you know'...” (Residential, broadband/fixed line)

2. SME – broadband/fixed line

The consumer – who has a strong Scottish accent – had a minor billing query. They had to go through a complicated IVR/speech recognition system that did not understand them and was eventually put through to an overseas call centre where they again were not understood (and vice versa). Added to this, the call centre operative would not diverge from her script and was ultimately unable to help them.

“Terrible service as always. Some days I put on an English accent because you get so frustrated when they ask you to repeat yourself.” (SME, broadband/fixed line)

A. Appendix I – The in-depth review of quality of service components

Outlined in the subsequent tables in this appendix is the detailed breakdown of each component of service for each of:

- Installation;
- Fixing problems/urgent issues;
- Fixing less urgent issues; and
- Reliability.

Initially this is broken down for residential consumers, followed by SME consumers. A standard process for detailing these service levels has been adopted as follows:

1. At the beginning of each section the key stages for dealing with that particular issue type are identified along with their relative importance;
2. Each stage is then broken down in terms of the key components of that stage to get it right from a consumer perspective;
3. Within each component levels of service have been identified – detailing what constitutes poor service, what constitutes acceptable/good service and what would be deemed excellent service. In some cases it is not possible to break out ‘acceptable/good’ actions from ‘excellent’ as they are more binary and these components are either delivered or not;
4. The bullets at the top of each table detail any overarching points of note in relation to that stage of the service journey.

Residential - Installing a new service

Area	Installing a new service		
Audience	Residential		
Stage	Getting through to someone who can help		
<ul style="list-style-type: none"> Generally the start-point for every journey Consumers tend to enter into new service journeys in a more positive state than for other issues (i.e. anticipation/excitement of new product) 			
	Poor	Acceptable/good	Excellent
Finding the number	<ul style="list-style-type: none"> Difficult to find or hidden numbers on website 	<ul style="list-style-type: none"> 'One number' preferred by most (easier to remember/less confusion) Minority prefer separate numbers for specific departments or products (i.e. phone vs. broadband) 	
Time taken to speak to a person	<ul style="list-style-type: none"> Long wait times – up to 45 minutes mentioned Includes time spent on IVR Having to repeat security questions 	<ul style="list-style-type: none"> Shorter wait time, c. 5 minutes 	<ul style="list-style-type: none"> 'Immediately' answered by a human who can re-direct call accurately or, better still, deal with request
IVR performance	<ul style="list-style-type: none"> Little/no indication of position in queue Complex and too lengthy series of choices Unable to 'go back' in system 	<ul style="list-style-type: none"> Gives indication of position in queue Good: offers call-back (which is delivered as promised) 	

Area	Installing a new service		
Audience	Residential		
Stage	Quality of first line support		
<ul style="list-style-type: none"> The first contact after getting through the IVR primes consumer responses to the rest of the experience Some of the elements that drive 'excellent' are also applicable to the wider corporate response First line support is frequently associated with offshore call centres 			
	Poor	Acceptable/good	Excellent
Understands me/my needs	<ul style="list-style-type: none"> Literally not understanding the request No empathy re: importance of the issue to customer 	<ul style="list-style-type: none"> Understands issue Able to progress the call 	<ul style="list-style-type: none"> Puts request into action on first call and/or gives a clear understanding of ensuing process
Ability to communicate	<ul style="list-style-type: none"> Unable to understand accents (both ways) Unable to understand terminology/jargon used by call handler 		<ul style="list-style-type: none"> Easily able to understand accent/terminology 'Cultural' understanding
The conversation	<ul style="list-style-type: none"> Scripted Unnecessary 'chit chat' No flexibility/unable to go 'off-script', so can't answer questions 	<ul style="list-style-type: none"> Scripted – but with more flexibility/improvisation and with knowledge to answer ad hoc questions 	<ul style="list-style-type: none"> Actively listening Proactive suggestions

Area	Installing a new service		
Audience	Residential		
Stage	Experience re-contacting/follow-up calls		
<ul style="list-style-type: none"> ▪ Less frequent for install than, say, problem resolution ▪ Therefore generally causes less dissatisfaction for install vs. problem resolution ▪ But repeated re-contacts resulting from poor service in other elements of installation become more heated and stressful 			
	Poor	Acceptable/good	Excellent
Re-explaining the issue	<ul style="list-style-type: none"> ▪ Having to explain the issue to each new person spoken to ▪ Applies both within a single call and in later re-contact 	<ul style="list-style-type: none"> ▪ Notes kept on system ▪ And all call handlers have read them 	<ul style="list-style-type: none"> ▪ Named contact/number to handle issue on ongoing basis
Time taken	<ul style="list-style-type: none"> ▪ Being passed through to the wrong person/ getting cut-off and having to start again ▪ Exceedingly long time (over 5 minutes) when on hold ▪ Total length of time taken to get to right person (can be days) 	<ul style="list-style-type: none"> ▪ One pass over only 	<ul style="list-style-type: none"> ▪ Correct person re-contacts them ▪ Is up to speed on customer's specific needs/situation

Area	Installing a new service		
Audience	Residential		
Stage	Speaking to 'right' person		
<ul style="list-style-type: none"> ▪ This can be the first line support for certain product sales (especially mobile) 			
	Poor	Acceptable/good	Excellent
Selling	<ul style="list-style-type: none"> ▪ Does not listen to customer's needs ▪ Over sells, particularly irrelevant products 	<ul style="list-style-type: none"> ▪ Assesses needs <ul style="list-style-type: none"> ▪ Listens ▪ Clarifies ▪ Accurate description of product 	<ul style="list-style-type: none"> ▪ Overtly advises on choosing the best – not most expensive – product based on customer's requirement/ household
Communication	<ul style="list-style-type: none"> ▪ Misleads <ul style="list-style-type: none"> ▪ Deliberately ▪ By omission (e.g. price, product capabilities) ▪ By not ensuring that buyer understands 	<ul style="list-style-type: none"> ▪ Communication is honest <ul style="list-style-type: none"> ▪ Measured ▪ Neutral ▪ In line with customer's knowledge levels 	<ul style="list-style-type: none"> ▪ Accurate and straightforward explanation of: <ul style="list-style-type: none"> ▪ Process involved ▪ Timescales ▪ Required actions (from consumer) ▪ Made to feel their custom and issue matters

Area	Installing a new service		
Audience	Residential		
Stage	Time taken from order to completion		
<ul style="list-style-type: none"> This covers the length of time from placing a final order to installing/switching-on the service In many cases a physical installation is not required 			
	Poor	Acceptable/good	Excellent
Flexibility	<ul style="list-style-type: none"> Activation of bundled products is not synchronised Consumer has little choice No account taken of need to switch from old products <ul style="list-style-type: none"> Late/slow provision of PUK codes 	<ul style="list-style-type: none"> Bundled products are synchronised 	<ul style="list-style-type: none"> Consumer has choice/influence over scheduling
Speed	<ul style="list-style-type: none"> More than one week broadband/fixed-line More than 3-4 days if mobile Timings do not match initial promise 	<ul style="list-style-type: none"> Shorter time scales <ul style="list-style-type: none"> Less than a week for broadband/fixed-line 48 hours for mobile 	<ul style="list-style-type: none"> Next day
Explanation	<ul style="list-style-type: none"> No explanation or incorrect explanation of the process 	<ul style="list-style-type: none"> Process explained Process confirmed 	<ul style="list-style-type: none"> Process explained Process confirmed from central point (if a bundle) Choice of updates during process (frequency/ method)

Area	Installing a new service		
Audience	Residential		
Stage	Flexibility of installation/set-up appointment		
<ul style="list-style-type: none"> This stage covers the process of scheduling any installations or other appointments necessary in acquiring a new product 			
	Poor	Acceptable/good	Excellent
Flexibility	<ul style="list-style-type: none"> Little/no choice of time/day Very long appointment windows Delays between switch-off of old services and installation of new 	<ul style="list-style-type: none"> Choice of day Long appointment windows 	<ul style="list-style-type: none"> Choice of day Choice of window (ideally short 1-2 hour slots)
Synchronisation	<ul style="list-style-type: none"> No synchronisation between suppliers Within bundle – different products installed/activated on different days 	<ul style="list-style-type: none"> All product elements at same time/closely coordinated 	
Updates	<ul style="list-style-type: none"> No confirmation Not informed of any delays 	<ul style="list-style-type: none"> Text/email updates on progress 	<ul style="list-style-type: none"> Proactive updates and confirmations, including direct from engineer Provision of engineer's mobile number

Area	Installing a new service		
Audience	Residential		
Stage	Quality of installation		
<ul style="list-style-type: none"> This covers the quality of work performed by the installer – from arrival to departure from the site 			
	Poor	Acceptable/good	Excellent
Arrival	<ul style="list-style-type: none"> Doesn't arrive at all – or very late Or arrives too early Minor issue: arrives late within window 	<ul style="list-style-type: none"> Arrives when scheduled to (including not before) Comes with the right hardware and necessary tools/kit 	<ul style="list-style-type: none"> Informs (in advance) of approximate time of arrival – <i>I'll be there at...</i> Calls in advance of arrival – <i>I'm on my way now</i>
Quality of work	<ul style="list-style-type: none"> Leaves a mess Doesn't take 'aesthetics' of site into consideration No flexibility 	<ul style="list-style-type: none"> Tidies area completely Some consultation/flexibility regarding siting 	<ul style="list-style-type: none"> Consults and complies with siting requests – displays sensitivity towards aesthetics of property
Result	<ul style="list-style-type: none"> Product not working at end of visit 	<ul style="list-style-type: none"> Product working at end of visit Briefing on basic functionality 	
Manner	<ul style="list-style-type: none"> Impolite/rude 	<ul style="list-style-type: none"> Professional/respectful Friendly 	

Area	Installing a new service		
Audience	Residential		
Stage	Quality of set-up: mobile phones		
<ul style="list-style-type: none"> Some consumers happy to set-up own phones Others prefer to get help either over the phone or in shops; poor service more likely from telephone support Quality of work performed by shop staff often used as example of good/excellent customer service 			
	Poor	Acceptable/good	Excellent
Result	<ul style="list-style-type: none"> Product not working at end of visit Product not set-up properly (e.g. contacts not copied over) Poor service more likely from telephone support 	<ul style="list-style-type: none"> Basic set-up (including contacts copied over) 	<ul style="list-style-type: none"> Helps 'personalise' set-up Provides usage guidance – shows what to do in future
Manner	<ul style="list-style-type: none"> Impolite/rude – makes customer feel ignorant 	<ul style="list-style-type: none"> Professional/respectful Friendly 	

Area	Installing a new service		
Audience	Residential		
Stage	Quality of set-up: self set-up of broadband		
<ul style="list-style-type: none"> Majority of broadband 'installs' are self-service, using instructions that come with the router Therefore provider performance hard to assess properly because successful installations ultimately dependent on both the quality of directions in device's instruction manual and the consumer's 'ability' Most customers have a good experience with self set-up 			
	Poor	Acceptable/good	Excellent
Instructions provided	<ul style="list-style-type: none"> Unclear No illustrations, written instructions only, or Illustrations not colour-coded Assuming too high a level of knowledge – use of jargon/tech language Requires too much effort 	<ul style="list-style-type: none"> Easy to understand Minimal knowledge needed/no use of jargon Step by step illustrations (including significance of different lights on device) 'Plug and play' – all the necessary kit in the box (including filters) 	
Time taken	<ul style="list-style-type: none"> More than 30 minutes 		<ul style="list-style-type: none"> Under 10 minutes
Result	<ul style="list-style-type: none"> Unable to set-up – get new broadband service to work Have to phone customer services 	<ul style="list-style-type: none"> New broadband service works If not, easy-to-find call centre number (and efficient operative at the end of the line if called) 	

Area	Installing a new service		
Audience	Residential		
Stage	Follow-up/issue completion		
<ul style="list-style-type: none"> This covers the communications or other follow-up following installation/issue completion 			
	Poor	Acceptable/good	Excellent
Follow-up provision	<ul style="list-style-type: none"> None Does not take account of actual events/issues Sent before issue resolved 	<ul style="list-style-type: none"> Basic follow-up (assuming no issues) 	<ul style="list-style-type: none"> Seems to be tailored/takes account of actual events/issues

Residential – Fixing problems/urgent issues

Area	Fixing problems/urgent issues		
Audience	Residential		
Stage	Getting through to someone who can help		
<ul style="list-style-type: none"> Generally the start-point for every journey Issues relating to timing and effort are considered more important here than for installation/new service – poor service here has greater negative impact, making initial problem worse 			
	Poor	Acceptable/good	Excellent
Finding the number	<ul style="list-style-type: none"> Difficult to find or hidden numbers Specific numbers for different products/issues (customer may not know issue) 	<ul style="list-style-type: none"> 'One number' preferred by most (easier to remember/less confusion) Minority prefer separate numbers for specific departments/products 	
Time taken to speak to a person	<ul style="list-style-type: none"> Long wait times – up to 45 minutes mentioned Includes time on IVR Having to repeat security questions (once through) 	<ul style="list-style-type: none"> Shorter wait time (within 5 minutes) 	<ul style="list-style-type: none"> 'Immediately' answered by a human who can resolve/re-direct call
IVR performance	<ul style="list-style-type: none"> Little indication of position in queue Unable to 'go back' in system Complex and too lengthy series of choices 	<ul style="list-style-type: none"> Gives indication of position in queue Good: offers call-back (but must be fulfilled) 	

Area	Fixing problems/urgent issues		
Audience	Residential		
Stage	Quality of first line support		
<ul style="list-style-type: none"> The first contact after getting through the IVR primes consumer responses to the rest of the experience Some of the elements that drive 'excellent' are also applicable to the way providers should respond to other issues First line support is frequently associated with 'offshore' call centres 			
	Poor	Acceptable/good	Excellent
Understands me/my needs	<ul style="list-style-type: none"> Literally not understanding the issue And not understanding the importance of the issue to the consumer 	<ul style="list-style-type: none"> Actively listens Understands issue Able to progress the call 	<ul style="list-style-type: none"> Displays empathy Understands the issues Resolves issue on that call and/or gives a clear means to progress
Ability to communicate	<ul style="list-style-type: none"> Unable to understand accents (both ways) Unable to understand terminology or familiar cultural references 		<ul style="list-style-type: none"> Easily able to understand accent/terminology 'Cultural' understanding
The conversation	<ul style="list-style-type: none"> Scripted - no flexibility/unable to go 'off-script' Unnecessary 'chit chat' 	<ul style="list-style-type: none"> Scripted – but more flexibility to tailor to customer's specifics (or in response to customer's questions) 	<ul style="list-style-type: none"> Actively listening Proactive suggestions

Area	Fixing problems/urgent issues
Audience	Residential
Stage	Experience re-contacting/follow-up calls

- More frequently experienced for problem resolution than installation
- Also consumers are in a more emotional 'hot state'
- Therefore impact can be greater

	Poor	Acceptable/good	Excellent
Re-explaining the issue	<ul style="list-style-type: none"> ▪ Having to explain the issue to each new person spoken to ▪ Applies both within a single call and in any later re-contact 	<ul style="list-style-type: none"> ▪ Notes kept on system ▪ Clearly been read/scanned by new responder (even if customer asked to 'hang on a minute') 	<ul style="list-style-type: none"> ▪ Named contact/number to handle issue on ongoing basis
Time taken	<ul style="list-style-type: none"> ▪ Being passed through to the wrong person/ getting cut-off is the worst level as requires 'starting again' ▪ Exceedingly long time (over 5 minutes) when hold ▪ Total length of time taken to get to person (can be days) 	<ul style="list-style-type: none"> ▪ One pass over only ▪ Customer feels at least partly properly 'handed over' and not starting again 	<ul style="list-style-type: none"> ▪ Correct person re-contacts them or put straight through ▪ Seems up to speed on issue

Area	Fixing problems/urgent issues
Audience	Residential
Stage	Speaking to 'right' person

- This can be the first line support for certain product areas (especially mobile)

	Poor	Acceptable/good	Excellent
Problem diagnosis	<ul style="list-style-type: none"> ▪ Does not listen to consumer perspective ▪ Doesn't understand problem ▪ Doesn't understand importance of problem to consumer 	<ul style="list-style-type: none"> ▪ Actively listen ▪ Able to assess and progress resolution of the problem 	<ul style="list-style-type: none"> ▪ Understands importance of the problem to the consumer and urgency
Communication	<ul style="list-style-type: none"> ▪ Misleads <ul style="list-style-type: none"> ▪ Deliberately ▪ By omission ▪ By not ensuring that consumer understands ▪ Doesn't seem to care 	<ul style="list-style-type: none"> ▪ Communication is honest <ul style="list-style-type: none"> ▪ Within sensible parameters ▪ Realistic ▪ Sense that they are a customer 	<ul style="list-style-type: none"> ▪ Accurate and straightforward explanation of: <ul style="list-style-type: none"> ▪ The process ▪ Timescales ▪ Required actions (from consumer) ▪ Adapt style to suit customer understanding ▪ Made to feel their custom and issue matters

Area	Fixing problems/urgent issues		
Audience	Residential		
Stage	Time taken to achieve resolution		
<ul style="list-style-type: none"> This covers the length of time from reporting the problem to resolution In many cases an engineer visit may not be required 			
	Poor	Acceptable/good	Excellent
Speed	<ul style="list-style-type: none"> More than one week for broadband/fixed-line More than 3-4 days if mobile Timings do not match initial promise 	<ul style="list-style-type: none"> Within one week for serious faults and less essential issues Within a few hours when fault can be resolved remotely 	<ul style="list-style-type: none"> Responses match importance/urgency of the issue Next day for mobile/total loss of broadband (major issue) Within the week for billing, non-essential issues, etc.
Explanation	<ul style="list-style-type: none"> No explanation or incorrect explanation of the process 	<ul style="list-style-type: none"> Process explained Process confirmed 	<ul style="list-style-type: none"> Process explained Choice of updates during process (frequency/method)

Area	Fixing problems/urgent issues		
Audience	Residential		
Stage	Flexibility of engineer appointment		
<ul style="list-style-type: none"> This stage covers the process of scheduling any engineer visits or other appointments necessary to resolve a fault/problem 			
	Poor	Acceptable/good	Excellent
Flexibility	<ul style="list-style-type: none"> Little choice of time/day Very long appointment windows 	<ul style="list-style-type: none"> Choice of day Long appointment windows 	<ul style="list-style-type: none"> Choice of day Choice of window (ideally 1-2 hour slots)
Synchronisation	<ul style="list-style-type: none"> No synchronisation between suppliers/products if more than one involved 	<ul style="list-style-type: none"> Suppliers/products coordinated 	
Updates	<ul style="list-style-type: none"> No confirmation Not informed of any delays 	<ul style="list-style-type: none"> Text/email updates on progress 	<ul style="list-style-type: none"> Proactive updates and confirmations (inc. direct from engineer) Provision of engineer's mobile number

Area	Fixing problems/urgent issues
Audience	Residential
Stage	Quality of engineer visit

- This covers the quality of work performed by the engineer – from arrival to departure from the site

	Poor	Acceptable/good	Excellent
Arrival	<ul style="list-style-type: none"> ▪ Doesn't arrive at all – or very late ▪ Or arrives too early ▪ Minor issue: arrives late within window 	<ul style="list-style-type: none"> ▪ Arrives within window 	<ul style="list-style-type: none"> ▪ Informs (in advance) of approximate time of arrival ▪ Calls in advance of arrival
Quality of work	<ul style="list-style-type: none"> ▪ Leaves a mess 	<ul style="list-style-type: none"> ▪ Tidies area completely 	<ul style="list-style-type: none"> ▪ Tidies area completely ▪ Advises on avoidance of further problems
Result	<ul style="list-style-type: none"> ▪ Fault not resolved at end of visit 	<ul style="list-style-type: none"> ▪ Product working at end of visit 	
Manner	<ul style="list-style-type: none"> ▪ Impolite/rude 	<ul style="list-style-type: none"> ▪ Professional/respectful ▪ Friendly and efficient (i.e. respect customer's inconvenience) 	

Area	Fixing problems/urgent issues
Audience	Residential
Stage	Follow-up and compensation

- This covers the communications or other follow-up following resolution
- Majority of consumers would prefer to have a good level of service rather than the need for compensation

	Poor	Acceptable/good	Excellent
Follow-up provision	<ul style="list-style-type: none"> ▪ None ▪ Does not take account of actual events/issues ▪ Sent before issue resolved 	<ul style="list-style-type: none"> ▪ Basic follow-up (assuming no issues) 	<ul style="list-style-type: none"> ▪ Seems to be tailored/takes account of actual events/issues
Compensation offered	<ul style="list-style-type: none"> ▪ None ▪ Only after consumer demand ▪ Not commensurate with problem 	<ul style="list-style-type: none"> ▪ After consumer prompting ▪ Commensurate with the issue 	<ul style="list-style-type: none"> ▪ Proactive ▪ Exceeds expectations of compensation for level of problem

Residential – Fixing less urgent issues

Area	Fixing less urgent issues		
Audience	Residential		
Stage	Getting through to someone who can help		
<ul style="list-style-type: none"> Generally the start-point for every journey Issues relating to timing and effort are considered more important than for installation/new service – poor service has greater impact because customers just want to get something simple done quickly and remove it from 'to-do' list 			
	Poor	Acceptable/good	Excellent
Finding the number	<ul style="list-style-type: none"> Hard to find or hidden numbers No general number / specific numbers for different products/issues 	<ul style="list-style-type: none"> 'One number' preferred by most (easier to remember/less confusion) Prominently displayed/easy to find on website Minority prefer separate numbers for specific departments/products: quicker to access dedicated team 	
Time taken to speak to a person	<ul style="list-style-type: none"> Long wait times – up to 45 minutes mentioned Includes time spent on IVR Having to repeat security questions (once through) 	<ul style="list-style-type: none"> Shorter wait time 	<ul style="list-style-type: none"> 'Immediately' answered by a human who can resolve/re-direct call
IVR performance	<ul style="list-style-type: none"> Little indication of position in queue Complex and too lengthy series of choices Unable to 'go back' in system 	<ul style="list-style-type: none"> Gives indication of position in queue Good: offers call-back 	

Area	Fixing less urgent issues		
Audience	Residential		
Stage	Quality of first line support		
<ul style="list-style-type: none"> The first contact after getting through the IVR primes consumer responses to the rest of the experience Some of the elements that drive 'excellent' are also applicable to the wider corporate response First line support is frequently associated with 'offshore' call centres 			
	Poor	Acceptable/good	Excellent
Understands me/my needs	<ul style="list-style-type: none"> Literally not understanding the issue And not understanding the importance of the issue to the consumer 	<ul style="list-style-type: none"> Understands issue Able to progress the call 	<ul style="list-style-type: none"> Displays empathy Understands the issues Resolves issue on that call and/or gives a clear means to progress
Ability to communicate	<ul style="list-style-type: none"> Unable to understand accents Unable to understand terminology/familiar cultural references 		<ul style="list-style-type: none"> Easily able to understand accent/terminology 'Cultural' understanding
The conversation	<ul style="list-style-type: none"> Scripted Unnecessary 'chit chat' No flexibility/Unable to go 'off-script' 	<ul style="list-style-type: none"> Scripted – but more flexibility 	<ul style="list-style-type: none"> Listens actively Proactively makes suggestions

Area	Fixing less urgent issues		
Audience	Residential		
Stage	Experience re-contacting/follow-up calls		
<ul style="list-style-type: none"> More frequently experienced for problem resolution than installation Consumers are in a less emotional 'hot state' than seen for faults/more urgent issues – although this can change if the service received is poor Even issues that are less urgent can require repeat calls if the issue is unusual 			
	Poor	Acceptable/good	Excellent
Re-explaining the issue	<ul style="list-style-type: none"> Having to explain the issue to each new person spoken to Applies both within a single call and in any later re-contact 	<ul style="list-style-type: none"> Notes kept on system Clearly been read/ scanned by new responder (even if customer asked to 'hang on a minute') 	<ul style="list-style-type: none"> Named contact/number to handle issue on ongoing basis
Time taken	<ul style="list-style-type: none"> Being passed through to the wrong person/ getting cut-off is the worst level as requires 'starting again' Exceedingly long time (over 5 minutes) when hold Total length of time taken to get to person (can be days) 	<ul style="list-style-type: none"> One pass over only 	<ul style="list-style-type: none"> Correct person re-contacts them Seems up to speed on issue

Area	Fixing less urgent issues		
Audience	Residential		
Stage	Speaking to 'right' person		
<ul style="list-style-type: none"> This can be the first line support for basic queries (especially mobile) 			
	Poor	Acceptable/good	Excellent
Problem diagnosis	<ul style="list-style-type: none"> Does not listen to consumer perspective Doesn't understand problem Doesn't understand importance of problem to consumer 	<ul style="list-style-type: none"> Able to assess and progress resolution of the problem 	<ul style="list-style-type: none"> Able to assess and progress resolution of the problem Understands importance of the problem to the consumer
Communication	<ul style="list-style-type: none"> Misleads <ul style="list-style-type: none"> Deliberately By omission By not ensuring that consumer understands 	<ul style="list-style-type: none"> Communication is honest <ul style="list-style-type: none"> Within sensible parameters Realistic 	<ul style="list-style-type: none"> Accurate and straightforward explanation of: <ul style="list-style-type: none"> The process Timescales Required actions (from consumer) Adapt style to suit customer understanding Made to feel their custom and issue matters

Area	Fixing less urgent issues		
Audience	Residential		
Stage	Time taken to achieve resolution		
<ul style="list-style-type: none"> This covers the length of time from reporting the problem to resolution In most cases, a less urgent issue (e.g. small billing problem) is expected to be sorted in the space of a single contact In the vast majority of cases an engineer visit is not required 			
	Poor	Acceptable/good	Excellent
Speed	<ul style="list-style-type: none"> Several calls to action Longer than a week to resolve 	<ul style="list-style-type: none"> Action taken within one call, but final resolution to issue might reasonably take a week 	<ul style="list-style-type: none"> One call, immediate/with 24 hours resolution Confirmation of 'case closed'
Explanation	<ul style="list-style-type: none"> No explanation 	<ul style="list-style-type: none"> Process explained Process confirmed 	<ul style="list-style-type: none"> Issue explained (if applicable) Process explained

Area	Fixing less urgent issues		
Audience	Residential		
Stage	Follow-up and compensation		
<ul style="list-style-type: none"> For most customers, follow-up and compensation are <u>not</u> expected elements of contacts involving less urgent issues – they just expect any small problem to be cleared up quickly and they are not in themselves big enough issues to warrant any kind of payback If they receive a small token of compensation when clearing up a small issue not of their making (e.g. they've been billed twice for a film they've rented on their provider's TV service, and are given a free film to compensate) then this is an excellent bonus It's only when there are problems resolving a small issue (e.g. multiple phone calls to provider, weeks passing before the problem is sorted) that compensation might be considered or expected 			
	Poor	Acceptable/good	Excellent
Follow-up provision		<ul style="list-style-type: none"> Confirmation that required action has been taken Confirmation of 'case closed' 	
Compensation offered			<ul style="list-style-type: none"> Small gesture to compensate for original issue and inconvenience involved resolving it

Residential – Reliability

Area	Reliability		
Audience	Residential		
Stage	Broadband		
<ul style="list-style-type: none"> Broadband reliability is often perceived as being impacted by rurality; expectations that service will typically be worse in rural locations Ongoing reliability problems can cause escalation to 'problem/fault' category 			
	Poor	Acceptable/good	Excellent
Provision of service	<ul style="list-style-type: none"> Frequent (daily) outages Long outages (more than 20 minutes) 	<ul style="list-style-type: none"> Infrequent (less than once a month) Short (less than 5-10 minutes) 	
Slower than promised speed	<ul style="list-style-type: none"> Consistently slower than expected and prevents/hampers activity (e.g. browsing, downloads) 	<ul style="list-style-type: none"> Slow at certain peak times (after school, evening) 	<ul style="list-style-type: none"> Consistent expected speed
Visible buffering	<ul style="list-style-type: none"> Consistently buffers and prevents activity (e.g. catch-up TV) 	<ul style="list-style-type: none"> Buffers at certain peak times (after school, evening) 	<ul style="list-style-type: none"> Consistent absence of buffering

Area	Reliability		
Audience	Residential		
Stage	Fixed-line phone		
<ul style="list-style-type: none"> Fixed-line phones are seen as the most reliable of the three products discussed Any outage therefore may have major impact, particularly on older customers who may be more reliant on their fixed-phone vs. mobile – but at same time is often thought to result from a major event, often outside of the control of the provider Ongoing reliability problems cause escalation to 'problem/fault' category 			
	Poor	Acceptable/good	Excellent
Provision of service	<ul style="list-style-type: none"> Frequent (monthly) outages Long outages (more than 20 minutes) 	<ul style="list-style-type: none"> Infrequent (less than once a year) Short (less than 5-10 minutes) 	
Interference on the line	<ul style="list-style-type: none"> Occasional Once a week or more 	<ul style="list-style-type: none"> None 	

Area	Reliability
Audience	Residential
Stage	Mobile phone

- Reliability is often difficult for consumers to assess for mobile phones
- Poor reliability can be conflated with coverage and/or handset issues
- In some areas mobile providers are often chosen on the basis of the coverage they provide in that area (especially rural)
- Poor coverage/signal strength at home is increasingly an issue for customers as their mobile is more used than fixed-line
- Ongoing reliability problems cause escalation to 'problem/fault' category

	Poor	Acceptable/good	Excellent
Provision of service	<ul style="list-style-type: none"> ▪ Long outages in areas where can normally get service ▪ (Increasingly) poor signal at home 	<ul style="list-style-type: none"> ▪ Infrequent (less than once a month) ▪ Short (less than 5-10 minutes) 	
Reduced signal	<ul style="list-style-type: none"> ▪ Weaker signal in areas where signal usually good ▪ Weaker signal at certain times of the day ▪ As above for smartphone mobile internet speed 	<ul style="list-style-type: none"> ▪ Consistent expected signal strength (and, for smartphone, mobile internet speed) 	

SME – Installing a new service

Area	Installing a new service		
Audience	SME		
Stage	Getting through to someone who can help		
<ul style="list-style-type: none"> Generally the start point for every journey Consumers tend to enter into new service journeys in a more positive state than for other areas – however SME users are often more concerned than residential due to greater perceived risks Issues in this area more likely to be experienced by smaller SMEs 			
	Poor	Acceptable/good	Excellent
Finding the number	<ul style="list-style-type: none"> Difficult to find or hidden numbers Specific numbers for different products/issues 	<ul style="list-style-type: none"> 'One number' preferred by most (easier to remember/less confusion) – especially smaller companies Minority prefer separate numbers for specific departments 	
Time taken to speak to a person	<ul style="list-style-type: none"> Long wait times Includes time spent on IVR Having to repeat security questions 	<ul style="list-style-type: none"> Shorter wait time 	<ul style="list-style-type: none"> 'Immediately' answered by a human who can resolve/re-direct call
IVR performance (mentioned by small SMEs)	<ul style="list-style-type: none"> Little indication of position in queue Unable to 'go back' in system Voice activated system doesn't work Complex and too lengthy series of choices 	<ul style="list-style-type: none"> Gives indication of position in queue Good: offers call-back (and fulfilled) 	

Area	Installing a new service		
Audience	SME		
Stage	Quality of first line support		
<ul style="list-style-type: none"> The first contact after getting through the IVR primes consumer responses to the rest of the experience Some of the elements that drive 'excellent' are also applicable to the way providers respond to other issues Poor first line support is frequently associated with 'offshore' call centres 			
	Poor	Acceptable/good	Excellent
Understands me/my needs	<ul style="list-style-type: none"> Literally not understanding the issue Not understanding the importance/urgency of the issue to the consumer 	<ul style="list-style-type: none"> Understands issue Able to progress the call 	<ul style="list-style-type: none"> Understands the issues Resolves issue on that call and/or gives clear means to progress
Ability to communicate	<ul style="list-style-type: none"> Unable to understand accents (both ways) Unable to understand terminology (customer) 	<ul style="list-style-type: none"> Able to provide sufficient instruction to progress the issue 	<ul style="list-style-type: none"> Easily able to understand accent/terminology 'Cultural' understanding
The conversation	<ul style="list-style-type: none"> Scripted Unnecessary 'chit chat' No flexibility/unable to go 'off-script' 	<ul style="list-style-type: none"> Scripted – but more flexibility to take into account customer specifics/circumstances 	<ul style="list-style-type: none"> Actively listening Proactive suggestions

Area	Installing a new service		
Audience	SME		
Stage	Experience re-contacting/follow-up calls		
<ul style="list-style-type: none"> Less frequent for installation than for problem resolution Therefore generally causes less dissatisfaction for installation than problem resolution Can be more problematic if a number of suppliers are involved in the issue Issues in this area more likely to be experienced by smaller SMEs 			
	Poor	Acceptable/good	Excellent
Re-explaining the issue	<ul style="list-style-type: none"> Having to explain the issue to each new person spoken to Applies both within a single call and if later re-contact 	<ul style="list-style-type: none"> Notes kept on system Staff aware of and have read notes 	<ul style="list-style-type: none"> Named contact/number to handle issue on ongoing basis Contact is available or has informed stand-in
Time taken	<ul style="list-style-type: none"> Being passed through to the wrong person/ getting cut-off is the worst level as requires 'starting again' Exceedingly long time (over 5 minutes) when put on hold Total length of time taken to get to person (can be days) Having to re-contact a number of times 	<ul style="list-style-type: none"> One pass over only 	<ul style="list-style-type: none"> Correct person re-contacts them Up to speed on issues

Area	Installing a new service		
Audience	SME		
Stage	Speaking to 'right' person		
<ul style="list-style-type: none"> This can be the first line support for certain product sales (especially mobile) Issues in this area more likely to be experienced by smaller SMEs – larger more likely to have dedicated account manager (or third party) 			
	Poor	Acceptable/good	Excellent
Selling	<ul style="list-style-type: none"> Does not listen to product needs Over sells (especially smaller SMEs, broadband) 	<ul style="list-style-type: none"> Assesses needs <ul style="list-style-type: none"> Listens Clarifies Accurate description of product 	<ul style="list-style-type: none"> Overtly advises on choosing the best – not most expensive – product for them Understands existing set-up and business needs
Communication	<ul style="list-style-type: none"> Misleads <ul style="list-style-type: none"> Deliberately By omission By not ensuring that buyer understands 	<ul style="list-style-type: none"> Communication is honest <ul style="list-style-type: none"> Within sensible parameters Realistic Effectively communicates to all suppliers involved/departments 	<ul style="list-style-type: none"> Accurate and straightforward explanation of: <ul style="list-style-type: none"> The process Timescales Required actions (from consumer) Adapt style to suit customers (amateur vs. professional decision maker)

Area	Installing a new service		
Audience	SME		
Stage	Time taken from order to completion		
<ul style="list-style-type: none"> This covers the length of time from placing a final order to installing/switching-on the service In many cases a physical installation is not required Time taken is especially important when switching or moving premises 			
	Poor	Acceptable/good	Excellent
Flexibility	<ul style="list-style-type: none"> Activation of bundled products is not synchronised Consumer has little choice in scheduling No account taken of need to switch from old products, esp. broadband 	<ul style="list-style-type: none"> Some influence over scheduling Bundled products are synchronised Provider activities synchronised 	<ul style="list-style-type: none"> Consumer has choice to fit in with their schedule
Speed	<ul style="list-style-type: none"> More than one week for BB/landline More than 3-4 days if mobile Timings don't match initial promise 	<ul style="list-style-type: none"> Shorter timescales Meeting customer's deadlines/timetable 	<ul style="list-style-type: none"> Next day
Explanation	<ul style="list-style-type: none"> No explanation or incorrect explanation of the process and timings 	<ul style="list-style-type: none"> Process explained Process confirmed 	<ul style="list-style-type: none"> Process explained Process confirmed from central point (if a bundle) Choice of updates during process (frequency/method)

Area	Installing a new service		
Audience	SME		
Stage	Flexibility of installation/set-up appointment		
<ul style="list-style-type: none"> This stage covers the process of scheduling any installations or other appointments necessary in acquiring a new product Important in regards to avoiding loss of productivity or coinciding with office move/new site opening 			
	Poor	Acceptable/good	Excellent
Flexibility	<ul style="list-style-type: none"> No/little choice of time/day Very long appointment windows Delays between switch-off of old services and installation of new: a gap 	<ul style="list-style-type: none"> Choice of day Long appointment windows 	<ul style="list-style-type: none"> Choice of day Choice of window (ideally 1-2 hour slots) Out of hours slots
Synchronisation	<ul style="list-style-type: none"> Within bundle – different products activated/installed on different days Poorly coordinated by providers 	<ul style="list-style-type: none"> All product elements at same time/closely coordinated 	
Updates	<ul style="list-style-type: none"> No confirmation Not informed of any delays Having to chase for updates 	<ul style="list-style-type: none"> Text/email updates on progress 	<ul style="list-style-type: none"> Proactive updates and confirmations including from engineer Provision of engineer's mobile number

Area	Installing a new service
Audience	SME
Stage	Quality of installation

- *This covers the quality of work performed by the installer – from arrival to departure from the site*

	Poor	Acceptable/good	Excellent
Arrival	<ul style="list-style-type: none"> ▪ Doesn't arrive at all or very late ▪ Or arrives too early ▪ Minor issue: arrives late within window 	<ul style="list-style-type: none"> ▪ Arrives within window ▪ Informed of any scheduling problems 	<ul style="list-style-type: none"> ▪ Informs (in advance) of approximate time of arrival
Quality of work	<ul style="list-style-type: none"> ▪ Leaves a mess ▪ Doesn't take layout of site into consideration ▪ Disrupts working day 	<ul style="list-style-type: none"> ▪ Tidies area completely ▪ Some consultation regarding siting ▪ Low impact on working day – w/o supervision 	<ul style="list-style-type: none"> ▪ Tidies area completely ▪ Consults and complies with siting requests
Result	<ul style="list-style-type: none"> ▪ Product not working at end of visit 	<ul style="list-style-type: none"> ▪ Product working at end of visit ▪ Briefing on basic functionality 	
Manner	<ul style="list-style-type: none"> ▪ Impolite/rude 	<ul style="list-style-type: none"> ▪ Professional/respectful ▪ Friendly 	

Area	Installing a new service
Audience	SME
Stage	Quality of set-up: mobile phones

- *Some smaller SMEs happy to set up own phones whilst others prefer to get help either over the phone or in shops*
- *Larger SMEs set up own phones*
- *Quality of work performed by shop staff often held up as example of good/excellent customer service*

	Poor	Acceptable/good	Excellent
Result	<ul style="list-style-type: none"> ▪ Product not working at end of consultation ▪ Product not set-up properly (e.g. contacts, diaries not copied over) 	<ul style="list-style-type: none"> ▪ Basic set-up (including contacts copied over) 	<ul style="list-style-type: none"> ▪ Helps 'personalise' set-up ▪ Provides usage guidance for future
Manner	<ul style="list-style-type: none"> ▪ Impolite/rude ▪ Condescending 	<ul style="list-style-type: none"> ▪ Professional/respectful ▪ Friendly 	

Area	Installing a new service		
Audience	SME		
Stage	Quality of set-up: self set-up of broadband		
<ul style="list-style-type: none"> Many broadband installs are self-service amongst micro SMEs (especially if using residential services) Few medium or larger SMEs seem to do self set-up Therefore performance in this area is a combination of provider process/info and consumer 'ability' It is therefore difficult to assess quality of instructions, etc. 			
	Poor	Acceptable/good	Excellent
Instructions provided	<ul style="list-style-type: none"> Unclear Not colour coded/using illustrations Assuming too high a level of knowledge Requires too much effort; adding to busy workload/work stress 	<ul style="list-style-type: none"> Easy to understand Minimal knowledge needed/no use of jargon Step by step illustrations, including clarification of lights on device; explanation of length of 'booting up' time 'Plug and play' with all kit provided (e.g. filters) 	
Time taken	<ul style="list-style-type: none"> More than 30 minutes 		<ul style="list-style-type: none"> Under 10 minutes
Result	<ul style="list-style-type: none"> Unable to set-up or get new broadband service to work Having to phone customer services (and struggling to find number/get through) 	<ul style="list-style-type: none"> New broadband service works Easy to access customer service number (and competent staff at end of line) if required 	

Area	Installing a new service		
Audience	SME		
Stage	Follow-up/issue completion		
<ul style="list-style-type: none"> This covers the communications or other follow-up following installation/issue completion 			
	Poor	Acceptable/good	Excellent
Follow-up provision	<ul style="list-style-type: none"> None Does not take account of actual events/issues Sent before issue resolved 	<ul style="list-style-type: none"> Basic follow-up (assuming no issues) 	<ul style="list-style-type: none"> Seems to be tailored/takes account of actual events/issues encountered at installation

SME – Fixing problems/urgent issues

Area	Fixing problems/urgent issues		
Audience	SME		
Stage	Getting through to someone who can help		
<ul style="list-style-type: none"> Generally the start-point for every journey Issues relating to timing and effort are more important than seen for installation/new service – poor service has greater impact Issues in this area more likely to be experienced by smaller SMEs – larger more likely to have account manager 			
	Poor	Acceptable/good	Excellent
Finding the number	<ul style="list-style-type: none"> Difficult to find or hidden numbers Specific numbers for different products/issues 	<ul style="list-style-type: none"> 'One number' preferred by most (easier to remember/less confusion) – especially smaller companies Minority prefer separate numbers for specific departments/products 	
Time taken to speak to a person	<ul style="list-style-type: none"> Long wait times – up to 45 minutes mentioned Includes time on IVR Having to repeat security questions (once through) 	<ul style="list-style-type: none"> Shorter wait time 	<ul style="list-style-type: none"> 'Immediately' answered by a human who can resolve/re-direct call
IVR performance	<ul style="list-style-type: none"> Little indication of position in queue Unable to 'go back' in system Complex and too lengthy series of choices 	<ul style="list-style-type: none"> Gives indication of position in queue Good: offers call-back 	

Area	Fixing problems/urgent issues		
Audience	SME		
Stage	Quality of first line support		
<ul style="list-style-type: none"> The first contact after getting through the IVR primes consumer responses to the rest of the experience Some of the elements that drive 'excellent' are also applicable to the wider corporate response First line support is frequently associated with offshore call centres Issues in this area more likely to be experienced by smaller SMEs – larger more likely to have account manager 			
	Poor	Acceptable/good	Excellent
Understands me/my needs	<ul style="list-style-type: none"> Not being able to speak to staff because named account holder is often FD or MD, not member of staff calling Literally not understanding the issue And not understanding the importance/urgency of the issue to the consumer 	<ul style="list-style-type: none"> Understands issue Able to progress the call 	<ul style="list-style-type: none"> Displays empathy Understands the issues Resolves issue on that call/gives clear means to progress
Ability to communicate	<ul style="list-style-type: none"> Unable to understand accents (both ways) Unable to understand terminology/cultural references 	<ul style="list-style-type: none"> Able to provide sufficient instruction to progress the issue 	<ul style="list-style-type: none"> Easily able to understand accent/terminology 'Cultural' understanding
The conversation	<ul style="list-style-type: none"> Scripted Unnecessary 'chit chat' No flexibility/unable to go 'off-script' 	<ul style="list-style-type: none"> Scripted – but more flexibility 	<ul style="list-style-type: none"> Actively listening Proactive suggestions for short-term solutions

Area	Fixing problems/urgent issues
Audience	SME
Stage	Experience re-contacting/follow-up calls

- More frequently experienced for problem resolution than installation
- Also customers are in a more emotional 'hot state', therefore impact can be greater
- Can be more problematic if a number of suppliers are involved in the issue

	Poor	Acceptable/good	Excellent
Re-explaining the issue	<ul style="list-style-type: none"> ▪ Having to explain the issue to each new person spoken to ▪ Applies both within a single call and if later re-contact 	<ul style="list-style-type: none"> ▪ Notes kept on system ▪ Have been read/scanned (even if called ask to 'wait a minute') 	<ul style="list-style-type: none"> ▪ Named contact/number to handle issue on ongoing basis
Time taken	<ul style="list-style-type: none"> ▪ Being passed through to the wrong person/ getting cut-off is the worst level as requires 'starting again' ▪ Exceedingly long time (over 5 minutes) when on hold ▪ Total length of time taken to get to person (can be days) ▪ Having to re-contact a number of times 	<ul style="list-style-type: none"> ▪ One pass over only 	<ul style="list-style-type: none"> ▪ Correct person re-contacts them or put straight through ▪ Seems up to speed on issue

Area	Fixing problems/urgent issues
Audience	SME
Stage	Speaking to 'right' person

- This can be the first line support for certain product sales (especially mobile)
- Issues in this area more likely to be experienced by smaller SMEs – larger more likely to have account manager

	Poor	Acceptable/good	Excellent
Problem diagnosis	<ul style="list-style-type: none"> ▪ Does not listen to consumer perspective ▪ Doesn't understand problem ▪ Takes caller through diagnosis process they may have already gone through themselves ▪ Doesn't understand importance/urgency of problem to consumer 	<ul style="list-style-type: none"> ▪ Listens to diagnosis (more expert) caller may have already made ▪ Able to assess and progress resolution of the problem 	<ul style="list-style-type: none"> ▪ Able to assess and progress resolution of the problem ▪ Understands importance of the problem to the consumer ▪ Suggests/sets up short-term fixes/temporary 'workarounds'
Communication	<ul style="list-style-type: none"> ▪ Misleads <ul style="list-style-type: none"> ▪ Deliberately ▪ By omission ▪ By not ensuring that consumer understands ▪ Patronises more expert callers 	<ul style="list-style-type: none"> ▪ Communication is honest <ul style="list-style-type: none"> ▪ Within sensible parameters ▪ Realistic ▪ Effectively communicates to all suppliers involved/departments 	<ul style="list-style-type: none"> ▪ Accurate and straightforward explanation of: <ul style="list-style-type: none"> ▪ The process ▪ Timescales ▪ Required actions (from consumer) ▪ Understands 'level' of caller and adapts style to suit

Area	Fixing problems/urgent issues		
Audience	SME		
Stage	Time taken to achieve resolution		
<ul style="list-style-type: none"> This covers the length of time from reporting the problem to resolution In many cases an engineer visit may not be required 			
	Poor	Acceptable/good	Excellent
Speed	<ul style="list-style-type: none"> More than two days Smaller SMEs sometimes more willing to accept longer timescales than larger Timings do not match initial promise 	<ul style="list-style-type: none"> One day 	<ul style="list-style-type: none"> Matches importance/urgency of the issue Depending on nature of business/workforce... <ul style="list-style-type: none"> Next day – mobile Same day – broadband or fixed-line
Explanation	<ul style="list-style-type: none"> No explanation or incorrect explanation of the process 	<ul style="list-style-type: none"> Process explained Process confirmed (inc. via email) 	<ul style="list-style-type: none"> Process explained Choice of updates during process (frequency/method)

Area	Fixing problems/urgent issues		
Audience	SME		
Stage	Time taken to achieve resolution		
<ul style="list-style-type: none"> This covers the length of time from reporting the problem to resolution In many cases an engineer visit may not be required 			
	Poor	Acceptable/good	Excellent
Speed	<ul style="list-style-type: none"> More than two days Smaller SMEs sometimes more willing to accept longer timescales than larger Timings do not match initial promise 	<ul style="list-style-type: none"> One day 	<ul style="list-style-type: none"> Matches importance/urgency of the issue Depending on nature of business/workforce... <ul style="list-style-type: none"> Next day – mobile Same day – broadband or fixed-line
Explanation	<ul style="list-style-type: none"> No explanation or incorrect explanation of the process 	<ul style="list-style-type: none"> Process explained Process confirmed (inc. via email) 	<ul style="list-style-type: none"> Process explained Choice of updates during process (frequency/method)

Area	Fixing problems/urgent issues
Audience	SME
Stage	Quality of engineer visit

▪ This covers the quality of work performed by the engineer – from arrival to departure from the site

	Poor	Acceptable/good	Excellent
Arrival	<ul style="list-style-type: none"> Doesn't arrive at all – or very late Or arrives too early Minor issue: arrives late within window 	<ul style="list-style-type: none"> Arrives within window Informs customer of any scheduling problems 	<ul style="list-style-type: none"> Informs (in advance) of approximate time of arrival (ideally night before) Calls in advance of actual arrival
Quality of work	<ul style="list-style-type: none"> Leaves a mess Disrupts working day 	<ul style="list-style-type: none"> Tidies area completely Minimises impact on working day 	<ul style="list-style-type: none"> Tidies area completely Advises on avoidance of further problems
Result	<ul style="list-style-type: none"> Fault not resolved at end of visit 	<ul style="list-style-type: none"> Product working at end of visit 	
Manner	<ul style="list-style-type: none"> Impolite/rude 	<ul style="list-style-type: none"> Professional/respectful Friendly 	

Area	Fixing problems/urgent issues
Audience	SME
Stage	Follow-up and compensation

▪ This covers the communications or other follow-up following resolution
 ▪ Majority of consumers would prefer to have a good level of service rather than the need for compensation
 ▪ Set/agreed compensation levels may be part of SLAs larger SMEs have with their providers

	Poor	Acceptable/good	Excellent
Follow-up provision	<ul style="list-style-type: none"> None Does not take account of actual events/issues Sent before issue resolved 	<ul style="list-style-type: none"> Basic follow-up (assuming no issues) 	<ul style="list-style-type: none"> Seems to be tailored/takes account of actual events/issues
Compensation offered	<ul style="list-style-type: none"> None Only after consumer demand Not commensurate with problem 	<ul style="list-style-type: none"> After consumer prompting Takes into account impact of problem to business and personnel having to resolve the problem 	<ul style="list-style-type: none"> Proactive Exceeds expectations of compensation for level of problem

SME – Fixing less urgent issues

Area	Fixing less urgent issues		
Audience	SME		
Stage	Getting through to someone who can help		
<ul style="list-style-type: none"> Generally the start point for every journey Issues relating to timing and effort are considered more important than for installation/new service – poor service has greater impact Issues in this area more likely to be experienced by smaller SMEs – larger more likely to have account manager Priority is getting simple issue cleared up as quickly and easily as possible: seen as easy problems to resolve and therefore provider should act accordingly 			
	Poor	Acceptable/good	Excellent
Finding the number	<ul style="list-style-type: none"> Difficult to find or hidden numbers Specific numbers for different products/issues 	<ul style="list-style-type: none"> 'One number' preferred by most (easier to remember/less confusion) Minority prefer separate numbers for specific departments/products 	
Time taken to speak to a person	<ul style="list-style-type: none"> Long wait times – up to 45 minutes mentioned Includes time on IVR Having to repeat security questions (once through) 	<ul style="list-style-type: none"> Shorter wait time 	<ul style="list-style-type: none"> 'Immediately' answered by a human who can resolve/re-direct call
IVR performance	<ul style="list-style-type: none"> Little indication of position in queue Unable to 'go back' in system Complex and too lengthy series of choices 	<ul style="list-style-type: none"> Gives indication of position in queue Good: offers call-back 	

Area	Fixing less urgent issues		
Audience	SME		
Stage	Quality of first line support		
<ul style="list-style-type: none"> The first contact after getting through the IVR primes consumer responses to the rest of the experience Some of the elements that drive 'excellent' are also applicable to the wider corporate response First line support is frequently associated with 'offshore' call centres Issues in this area more likely to be experienced by smaller SMEs – larger more likely to have account manager 			
	Poor	Acceptable/good	Excellent
Understands me/my needs	<ul style="list-style-type: none"> Literally not understanding the issue And not understanding the importance of the issue to the consumer 	<ul style="list-style-type: none"> Understands issue Able to progress the call 	<ul style="list-style-type: none"> Displays empathy Understands the issues Resolves issue on that call and/or gives a clear means to progress
Ability to communicate	<ul style="list-style-type: none"> Unable to understand accents Unable to understand terminology or familiar cultural references 		<ul style="list-style-type: none"> Easily able to understand accent/terminology 'Cultural' understanding
The conversation	<ul style="list-style-type: none"> Scripted Unnecessary 'chit chat' No flexibility/unable to go 'off-script' 	<ul style="list-style-type: none"> Scripted – but more flexibility 	<ul style="list-style-type: none"> Actively listening Proactive suggestions

Area	Fixing less urgent issues
Audience	SME
Stage	Experience re-contacting/follow-up calls

- More frequently experienced for problem resolution than installation
- Consumers are in a less emotional 'hot state' than seen for faults/more urgent issues – although this can change if the service received is poor
- Even issues that are less urgent can require repeat calls if the issue is unusual

	Poor	Acceptable/good	Excellent
Re-explaining the issue	<ul style="list-style-type: none"> ▪ Having to explain the issue to each new person spoken to ▪ Applies both within a single call and if later re-contact 	<ul style="list-style-type: none"> ▪ Notes kept on system and read/scanned 	<ul style="list-style-type: none"> ▪ Named contact/number to handle issue on ongoing basis
Time taken	<ul style="list-style-type: none"> ▪ Being passed through to the wrong person/ getting cut-off is the worst level as requires 'starting again' ▪ Exceedingly long time (over 5 minutes) when hold ▪ Total length of time taken to get to person (can be days) 	<ul style="list-style-type: none"> ▪ One pass over only 	<ul style="list-style-type: none"> ▪ Correct person re-contacts them or put straight through ▪ Seem up to speed on issue

Area	Fixing less urgent issues
Audience	SME
Stage	Speaking to 'right' person

- This can be the first line support for basic queries (especially mobile)
- Issues in this area more likely to be experienced by smaller SMEs – larger more likely to have account manager

	Poor	Acceptable/good	Excellent
Problem diagnosis	<ul style="list-style-type: none"> ▪ Does not listen to consumer perspective ▪ Doesn't understand problem ▪ Doesn't understand importance of problem to consumer 	<ul style="list-style-type: none"> ▪ Able to assess and progress resolution of the problem 	<ul style="list-style-type: none"> ▪ Able to assess and progress resolution of the problem ▪ Understands importance of the problem to the consumer
Communication	<ul style="list-style-type: none"> ▪ Misleads <ul style="list-style-type: none"> ▪ Deliberately ▪ By omission ▪ By not ensuring that consumer understands ▪ Patronises 	<ul style="list-style-type: none"> ▪ Communication is honest <ul style="list-style-type: none"> ▪ Within sensible parameters ▪ Realistic 	<ul style="list-style-type: none"> ▪ Accurate and straightforward explanation of: <ul style="list-style-type: none"> ▪ The process ▪ Timescales ▪ Required actions (from consumer) ▪ Adapt style to suit customer's level

Area	Fixing less urgent issues		
Audience	SME		
Stage	Time taken to achieve resolution		
<ul style="list-style-type: none"> This covers the length of time from reporting the problem to resolution – the hope is that resolution will be immediate in most cases In the vast majority of cases an engineer visit is not be required 			
	Poor	Acceptable/good	Excellent
Speed	<ul style="list-style-type: none"> More than one week (depending on issue) Timings do not match initial promise 	<ul style="list-style-type: none"> Resolution process under way immediately Within one week for final resolution/‘case closed’ depending on issue 	
Explanation	<ul style="list-style-type: none"> No explanation or incorrect explanation of the process 	<ul style="list-style-type: none"> Process explained Process confirmed ‘Case closed’ confirmed when it happens 	<ul style="list-style-type: none"> Process explained Choice of updates during process (frequency/method)

Area	Fixing less urgent issues		
Audience	SME		
Stage	Follow-up and compensation		
<ul style="list-style-type: none"> This covers the communications or other follow-up following resolution – follow-up is generally not expected for small issues resolved quickly Less demand for compensation for smaller scale issues – usually too small to warrant it, but an excellent bonus if provided Compensation is expected if there are problems resolving the original less urgent issue (e.g. multiple phone calls) Majority of consumers would prefer to have a good level of service rather than the need for compensation 			
	Poor	Acceptable/good	Excellent
Follow-up provision		<ul style="list-style-type: none"> If provided in the case of protracted resolution process 	
Compensation offered	<ul style="list-style-type: none"> In case of problematic resolution, none Only after consumer demand Not commensurate with problem (both original and poor resolution process) 		<ul style="list-style-type: none"> In case of easy issue resolution process, proactively provided In case of problematic issue resolution, process, exceeds expectations of compensation for level of problem

SME – Reliability

Area	Reliability		
Audience	SME		
Stage	Broadband		
<ul style="list-style-type: none"> Impact of reliability issues dependent on whether or not business has 'fall-backs' in place (e.g. dongles, redundant lines, etc.) Ongoing reliability problems can cause escalation to 'problem/fault' area 			
	Poor	Acceptable/good	Excellent
Provision of service	<ul style="list-style-type: none"> Frequent (daily) outages Long outages (more than 5 minutes) 	<ul style="list-style-type: none"> Infrequent (less than once a month) Short (less than 5 minutes) 	
Slower than promised speed	<ul style="list-style-type: none"> Consistently slower than expected, preventing access to internet/cloud systems or sending/receiving files, etc. 	<ul style="list-style-type: none"> Slow at certain peak times 	<ul style="list-style-type: none"> Consistent expected speed
Visible buffering	<ul style="list-style-type: none"> Consistently buffers 	<ul style="list-style-type: none"> Buffers at certain peak times 	<ul style="list-style-type: none"> Consistent absence of buffering

Area	Reliability		
Audience	SME		
Stage	Fixed-line phone		
<ul style="list-style-type: none"> Fixed-line phones are seen as the most reliable of the three products discussed Any outage therefore may have major impact – depending on the 'fail-safes' the business has in place – but at same time is only perceived as happening as a result of a major event, potentially outside of the control of the provider For small SMEs, especially independent retailers, any reliability problem can have a significant business impact because customers cannot contact them (and vice versa) and card payment systems will not function – any reliability issue will be considered 'poor' for them Ongoing reliability problems cause escalation to 'problem/fault' category 			
	Poor	Acceptable/good	Excellent
Provision of service	<ul style="list-style-type: none"> Frequent (weekly) outages Long outages (more than 5 minutes) 	<ul style="list-style-type: none"> Infrequent (less than once a year) Short (less than 5 minutes) 	
Interference on the line	<ul style="list-style-type: none"> Occasional Once a week or more 	<ul style="list-style-type: none"> None 	

Area	Reliability
Audience	SME
Stage	Mobile phone

- Reliability is often difficult for consumers to assess for mobile phones
- Poor reliability can be conflated with coverage and/or handset issues
- In some areas mobile providers are chosen on the basis of the coverage provided in that area (especially rural)
- Ongoing reliability problems cause escalation to 'problem/fault' area

	Poor	Acceptable/good	Excellent
Provision of service	<ul style="list-style-type: none"> ▪ Long outages in areas where can normally get service 	<ul style="list-style-type: none"> ▪ Infrequent (less than once a month) ▪ Short (less than 5-10 minutes) 	
Reduced signal	<ul style="list-style-type: none"> ▪ Weaker signal in areas where signal usually good (inc. office) ▪ Weaker signal denies access to internet on smartphones 	<ul style="list-style-type: none"> ▪ Consistent expected signal strength (and, for smartphone, mobile internet speed) 	

B. Appendix II – Additional sample details and recruitment criteria

The following criteria applied to the sample in addition to the details outlined in the earlier sections on sample composition:

In every group:

- Home or business decision-makers about telecoms services;
- All to have experienced at least two of the following reasons for contacting their fixed line, broadband or mobile provider in the last three months:
 - Installing a service;
 - Support or repair when something has gone wrong;
 - Issues relating to reliability of service;
 - For any other reason.
- At least four to have experienced the issues in the last year;
- Each issue to have been experienced by a minimum of two participants each;
- Mix of fixed line, broadband and mobile issues;
- Two customers of Virgin Media (*this was not possible in Aberdeen, Aberystwyth and Exeter where participants reported they lived in postcodes where Virgin Media is unavailable*);
- Remaining participants split between BT, Sky, TalkTalk, EE, etc. but no more than two participants to have the same provider;
- Mix of standalone and bundled fixed line and broadband packages;
- All to have mobile phone service, with a minimum of one and a maximum of two per group with each of Vodafone, O2, EE and Three (*this was not possible in some rural locations where consumers often use the one or two providers with the best coverage*);
- All pre-tasked to record recent customer service experiences in relation to telecoms and other markets.

In residential groups:

- Half the groups recruited from urban locations, half from rural locations;
- Eight participants per group, with a balanced mix of men and women;
- Mix of pre-, with-family and post-family lifestages;
- ‘Poor’ to ‘average’ levels of technical *knowledge (self-defined by number of devices used in household and attitude statements.)*

In SME groups:

- Six participants per group, with a balanced mix of men and women
- Size defined as:
 - **Micro:** one to nine employees
 - **Small:** ten to 49 employees
 - **Medium:** 50 to 249 employees
- Mix of business sectors.