



employers'
forum on
disability

Barrier free call routing

Designing customer-focused
inclusive telephone access



“BT receives over a million calls from our customers every week – we know how important it is to be able to pick up the phone and quickly and easily find the information you need. We are pleased to sponsor this new inclusive call routing guidance which will make it easier for everyone to do business over the telephone.”

**Carol Borghesi,
BT Disability Champion**

The Employers’ Forum on Disability is the world’s leading employers’ organisation working to the mutual benefit of business and disabled people. We make it easier to employ disabled people, serve disabled customers and develop partnerships with disabled stakeholders in the wider community.

‘Barrier free call routing’ has been produced with the support of BT and the Central Office of Information. It is based on the findings of market research commissioned by a steering group made up of a number of interested organisations and expert bodies. Members of the steering group included BT, the Central Office of Information, the Employers’ Forum on Disability, Hearing Concern, Ofcom, Royal Mail, Transport for London and Vertex.

The guidelines are based on interviews with disabled and older customers, companies operating call routing systems and technical suppliers, undertaken by market research company GfK NOP.

Feedback and advice was also provided by the British Dyslexia Association, EqualAbility, EIG, Future Inclusion, HSBC, Mencap, RNID, the Stroke Association and TAG. With special thanks to Vivienne Pozo, Hearing Concern and Fiona Miller, BT.

Contents

- 3** Introduction
- 4** The business case
- 6** Who are the customers affected?
- 8** Meeting the needs of textphone users
- 9** Call routing: The two main approaches to serving disabled customers
- 11** Which approach is best practice?
- 12** Call routing: The customer journey
- 14** Step 1: Negotiating the options
- 17** Step 2: Waiting for help
- 18** Step 3: Speaking to an operator
- 21** Step 4: Completing the transaction
- 22** Meeting your legal obligations
- 24** Putting together an action plan
- 26** Further sources of help and information
- 27** Good practice checklist

“It is vital that Government information is as accessible as possible to all sections of society. This guidance is a major step forward in making sure that all telephone services, including those used by the Government, are inclusive.”

Sean O’Neill,
Group Head, Direct and
Relationship Marketing,
Central Office of Information

Call routing

Call routing or steering manages incoming phone calls to make sure that they are handled by the most appropriate customer representative. An example of a call routing system is one in which the caller is prompted to choose the nature of their call from a voice menu of options².

This guidance focuses primarily on the systems being used most widely by UK business and service providers: touchtone or DTMF (Dual tone multi frequency) technology.

¹ This is a conservative estimate based on the numbers of disabled people whose primary impairment impacts on their use of call routing. Many people have multiple impairments and secondary impairments may also affect access (Labour Force Survey and ONS Census data)

² CRM Knowledge Base

Barrier free call routing works better for everyone

This authoritative new guidance is designed to help you develop call routing systems which are as easy as possible for your disabled and older customers to use. It explains the barriers experienced by older and disabled customers at each stage of the customer journey. It provides you with an overview of the law, the business benefits and a strategic approach to creating a more accessible and user-friendly system.

Call routing, while not universally popular with customers, is accepted to be here to stay and provides a vital ‘access point’ to businesses and service providers.

Done well, call routing can benefit the consumer as well as your business. Building accessibility into your system will help to create a system which works better for everyone.

Accessible systems are essential to enable an estimated 2.4 million disabled people and up to 9.5 million older customers to independently manage their own telephone calls¹. With an aging population throughout Western Europe, easy to use systems will become ever more important.

The research shows:

- Call routing causes significant and widespread problems for older and disabled customers. It limits their ability to access important information and deal with leading businesses.
- It is easy and cost effective to make improvements for these groups which will benefit everyone.
- Effective call routing exists and accessible systems can be designed at a reasonable cost – suppliers say that many companies are not requesting the options which would benefit disabled customers.

This guidance provides contact centre, customer service and marketing directors with the information needed to develop a barrier free and inclusive system.

Turn to the inside back cover for your good practice checklist

The business case for barrier free call routing

Building barrier free call routing which works better for older and disabled customers results in a system which works better for everyone.

Benefits

Increased access for a large and growing group of customers with significant spending power

- At least 2.4 million disabled customers³ and significant numbers of Britain's 9.5 million older people are excluded by inaccessible call routing.
- The number of people with impairments which affect their use of the telephone is increasing as Europe's population ages. Already 16% of the UK population is over 65 and 42% of older people have a disability⁴. Many more have milder difficulties with hearing, vision, memory and dexterity, which affect their use of the telephone.
- Customers over 50 have 30% more disposable income than those under 50⁵.
- Disabled adults in the UK have a combined annual spending power of £80 billion⁶.

Better designed, more efficient call routing which works better for everyone

- Addressing the needs of disabled and older customers helps businesses to focus on the customer's needs rather than solely the needs of the business – a key cause of problems with call routing systems.
- The majority of changes are easy to make and cost effective to implement.
- Accessible call routing systems are well designed systems, which enable businesses to achieve their core call routing targets:
 - More efficient use of advisers
 - Fewer transfers and reduced length of calls
 - Higher rates of successfully completed transactions
 - Fewer unnecessary calls
 - Reduced costs.
- Well designed systems are more stable and cost effective to maintain.

Poorly designed, inaccessible call routing systems result in more customers bypassing the system and waiting on hold in order to speak to an operator.

Bad experiences lead to disabled customers hanging up, taking their business elsewhere and, in some cases, avoiding making phone calls to companies that use call routing altogether.

³ This is a conservative estimate based on the numbers of people whose primary impairment impacts on their use of call routing. Many people have multiple impairments and secondary impairments may also affect access (Labour Force Survey and ONS Census data, 2005)

⁴ Labour Force Survey data 2005

⁵ OMD, December 2005

⁶ Department for Work and Pensions Estimate, December 2004

Benefits for disabled customers

While call routing remains unpopular, disabled people believe there are real benefits to accessible call routing, because it provides:

- An effective way of accessing 'easy' information, e.g. account balance
- Potential to cut down on queues
- Potential to get through quickly to appropriate operator

Disabled people find the phone cheap and convenient to use and, for many, it enables them to overcome barriers related to their impairment.

Improved corporate reputation in a high profile area of customer service

- Negative customer experiences of call routing systems attract a lot of bad press for business. The experiences of older and vulnerable people are often highlighted.
- 1 in 3 people are disabled or close to someone who is⁷. 59% of disabled customers surveyed recently say that the way they are treated by companies affects where their friends and families choose to shop⁸.

Improved community relations and better services for vulnerable customers

- Consumers increasingly expect businesses to set and meet high standards of ethical and socially responsible behaviour.
- Despite the rise of the internet, many disabled and older people rely on the telephone to maintain their independence. Companies have a responsibility to ensure that customers can access important information and essential services.

Enhanced ability to implement new technology effectively

- Building organisational knowledge of the needs of disabled and older customers helps ensure a genuine understanding of the diversity of customer needs and experiences.
- Call routing technology is changing fast: understanding how to involve disabled people in user testing and planning is essential to avoid costly future mistakes.
- Involving people who use systems differently upstream in the design process helps to promote innovations which benefit everyone.

Reduced legal risk

- Service providers have legal responsibilities towards disabled customers, including an obligation to anticipate the needs of groups of people with different impairments. Public sector organisations have an additional duty to be proactive in ensuring that their services do not exclude disabled people.
- Adopting good practice guidance will help to ensure that further regulation is not required.

⁷ ONS census data 2005

⁸ Employers' Forum on Disability and RADAR survey, 2006

Who are the customers affected?

Knowing who your customers are and understanding their needs is essential to good customer service. Ensure that you include disabled and older customers in this picture and understand how call routing affects them.

An estimated 2.4 million disabled people and a large proportion of the 9.5 million older people⁹ living in the UK are affected by inaccessible call routing.

People with hearing impairments

- Includes profoundly deaf people, hearing aid users, lip readers and British Sign Language users
- 1 in 7 of the UK population has a hearing impairment
- 1.1 million people are profoundly deaf and have difficulty using the voice telephone
- An estimated 30,000 customers use textphones in the UK
- 55% of people aged over 60 are deaf or hard of hearing¹⁰
- Hearing impaired people are often unable to hear certain frequencies
- Some people's speech is affected which can make speech recognition systems and communicating with operators difficult
- Textphone users find call routing frustrating
- Even mild hearing loss can cause problems in using the telephone

People with visual impairments

- Includes people who have partial sight
- There are 2 million people with sight problems in the UK
- 85% of people with sight problems are over 65¹¹; 255 in every 100,000 older people are estimated to be deafblind¹².
- People often have difficulty using smaller keypads, e.g. mobile phones, all-in-one handsets, as well as reading displays
- Problems remembering / storing numbers
- Mild impairments do not affect phone use

"If they say press the hash key, I don't know where it is...I don't know if they're in the same position on every phone."

Customer with visual impairment, Glasgow

⁹ Labour Force Survey and ONS Census Data 2005

¹⁰ RNID, Key facts and figures

¹¹ RNIB, Public Research statistics

¹² Deafblind Association, Facts and Figures

¹³ Labour Force Survey, 2005

¹⁴ Arthritis Care, Facts and figures

¹⁵ ONS 2000, Psychiatric morbidity among adults living in private households in Great Britain

Who are the customers affected?

People with dexterity problems

- Includes people with arthritis, amputees and people who have had strokes
- 401,000 disabled people of working age say that their main impairments affect the use of their arms and hands¹³
- 1 in 5 adults have arthritis which may affect dexterity¹⁴
- People may have difficulty using keypads and writing down telephone numbers
- Mild impairments do not affect telephone use

People with learning disabilities and difficulties

- Includes people with autism and Down's Syndrome
- There are 1.5 million people with learning disabilities in the UK¹⁹
- People with dyslexia may also be affected
- Learning disabilities can affect ability to understand and remember options and telephone numbers
- Lack of human contact, inability to re-run options and excessive speed are all barriers
- Many people with learning disabilities prefer not to use the phone

People with cognitive impairments

- Includes those with memory loss and mental health problems
- At any one time 1 in 6 adults have significant mental health problems¹⁵
- Approximately 10% of the population experience problems with concentration and forgetfulness¹⁶
- An estimated 1 in 20 older customers are affected by memory loss¹⁷; up to 700,000 people have some form of dementia¹⁸
- Memory loss affects ability to remember options and numbers
- Mental health difficulties may affect confidence levels / exacerbate frustration when using the phone

People with speech impairments

- An estimated 240,000 people in the UK have severe speech impairments²⁰
- Speech recognition systems are a significant barrier

¹⁶ ONS 2000

¹⁷ Mind, factsheet

¹⁸ Help the Aged, research briefing paper – medical outcomes

¹⁹ Mencap, facts and figures

²⁰ Extrapolated from ONS Census survey data and figures on prevalence in Europe – www.tiresius.org

Meeting the needs of textphone users

Call routing systems cause particular problems for textphone users. In the majority of cases, options are presented too quickly.

Call routing systems are impossible for textphone users to navigate, without either:

- the intervention of a third party such as a relay service (e.g. TextDirect), family member, friend or colleague.
- the inclusion of a function to interact through text messages and the ability to receive textphone input.
- the provision of an alternative contact number through a dedicated textphone access point.

In an attempt to assist customers TextDirect maintains a list of call routing and IVR systems and connects a Relay Operator into the call before the customer is connected. However, this facility should not be used as a replacement for poorly designed systems. As many textphone users prefer not to use relay services best practice is for companies to provide dedicated textphone numbers. However, companies with a lower call volume may consider providing a service to textphone users by ensuring staff are well trained.

Dedicated textphone access points should be:

- Widely advertised and clearly labelled as only for textphone users.
- Able to handle calls when the textphone user uses Voice Carry Over.
- Able to reject non-textphone calls.
- Answered by trained staff.

Tip

Some systems, including those supported by BT, enable a recorded message informing voice users that they have dialled the wrong number and instructing them to hang up.

“When I call a textphone number, they act like they don’t know how to use it. They transfer me to another department or say, ‘Hang on, I’ll ask someone who knows’. They are wasting my time.”

Deaf customer, Birmingham

Tip

There are systems available which can help to improve textphone access to your business. For example Texbox uses networked PCs to provide textphone callers with an option menu.
www.sensorycomms.com/uk/texbox.htm

Serving disabled customers: Two approaches

There are two approaches to call routing which companies commonly use to provide access for disabled customers:

Specialist approach

- Dedicated phone numbers for disabled customers, many of which go direct to operators.
- Specialist disability customer service teams, provided with additional information and disability awareness.
- Disabled customers are advised to avoid call routing system – e.g. to hold for operator.
- Systems record information about a customer's disability which can be used to direct future calls.
- BUT: This system relies on respondent identification – customers must be willing to offer information about their impairment.
- There is a danger that providing a separate channel for people with disabilities reinforces negative assumptions.
- Provision of a separate channel should not be used as an excuse for not improving the mainstream system.

Asking about and holding information on disability

Many disabled people choose not to self-identify as disabled and many older customers who have impairments would not consider themselves to have a disability.

The Data Protection Act (1998) requires service providers to ensure that all data-processing is carried out fairly and lawfully, according to the principles set out. Information must be adequate, relevant and not excessive. Ensure that information you hold about disabled customers is relevant to their use of your services and/or to their ability to use your call routing system.

Companies who gather information about disabled customers, for example

to ensure access to essential services or to provide reasonable adjustments, should remember that these may not always be the same customers who have difficulties with call routing. Many wheelchair users, for example, are unlikely to have problems, while older non-disabled customers with poor memory may have difficulties. Ensure that where call routing automatically identifies a disabled customer, assumptions are not made about the impact of a person's disability on their choices as a customer.

Customers may need assistance from a friend or family member to make a call or to complete a transaction, such as to pay a bill or check an account balance. Ensure that advisers are trained in the correct procedures to enable a nominated person to help with a call and to maintain the customer's confidentiality.

Serving disabled customers: Two approaches

Inclusive approach

- Focus on providing an accessible system which works well for everyone.
- All customers call the same number and experience the same 'route'.
- In some cases customers can avoid call routing if they hold.
- All advisers are given disability awareness training, which ensures all advisers should be able to deal with queries.
- Information stored by the system enables advisers to locate best service for the customer.
- No need for customers to identify themselves as different.
- BUT: Disabled customers are highly likely to encounter call routing system – therefore it must be as accessible and easy to use as possible.

HSBC bank provides one number for all customers to call. This enables customers to either use automated functions, such as checking a balance, or to hang on and speak to an adviser.

Inclusive design and customer service

The system, which handles 6 million calls a month, is designed from the customer perspective and has been tested by an external consultant. Customers were asked what they would like to be able to do over the telephone and new functions, including loan applications, have been introduced.

The system is simple to operate, with the number of options kept to the

minimum and the most popular options presented first. At all points customers can hold for an operator.

In order to ensure all customers receive excellent service, all customer service agents receive an element of disability awareness training within a comprehensive learning programme. Alongside a comprehensive complaints handling system, the Customer Disability Manager reviews complaints to identify potential barriers to access.

A separate team handles calls from textphone users. Advertising of the textphone number has been adapted to ensure it is readily available to textphone users by reducing the number of delays caused by misplaced calls from hearing customers.

Which approach is best practice?

As a general principle disabled people should be able to access services in the same way as everyone else and not be marked out as 'different'. However, the most important thing is that customers can both access your services and receive a good level of service.

At present the majority of organisations which took part in this research provide access to a specialist team. As companies become more aware of the issues facing disabled customers and technology develops, companies should work towards an inclusive system which is accessible to everyone.

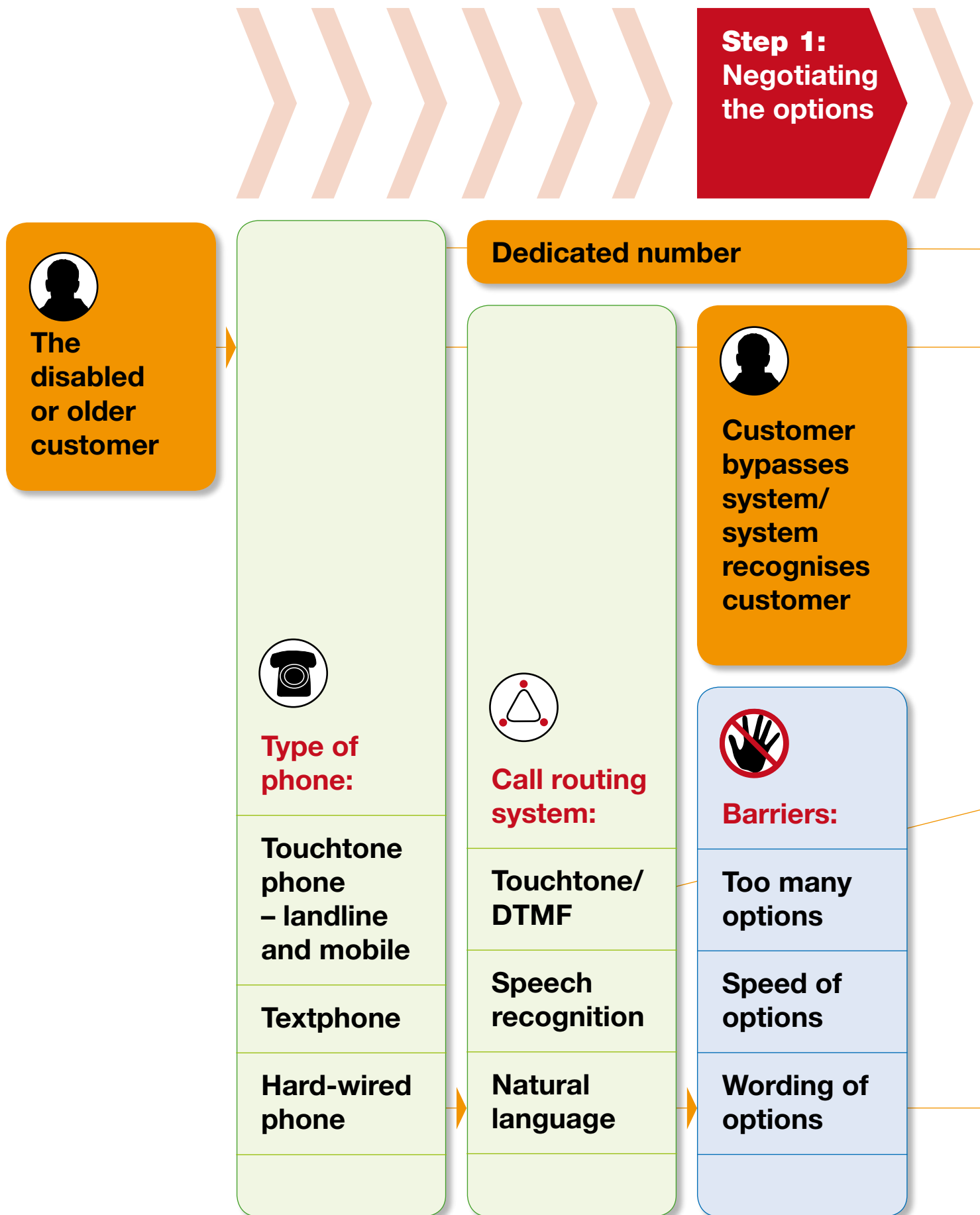
- Make your mainstream system as accessible and easy to use as possible for every customer.
- Provide alternative dedicated support where access remains unreasonably difficult for customers with specific needs AND while you are improving the accessibility of your mainstream system.
- Use call routing as part of a comprehensive contact strategy. There are some customers who will never find it easy to use the phone and will prefer alternative ways to get in touch – for example people with learning difficulties often prefer to visit a branch or store.

Benefits

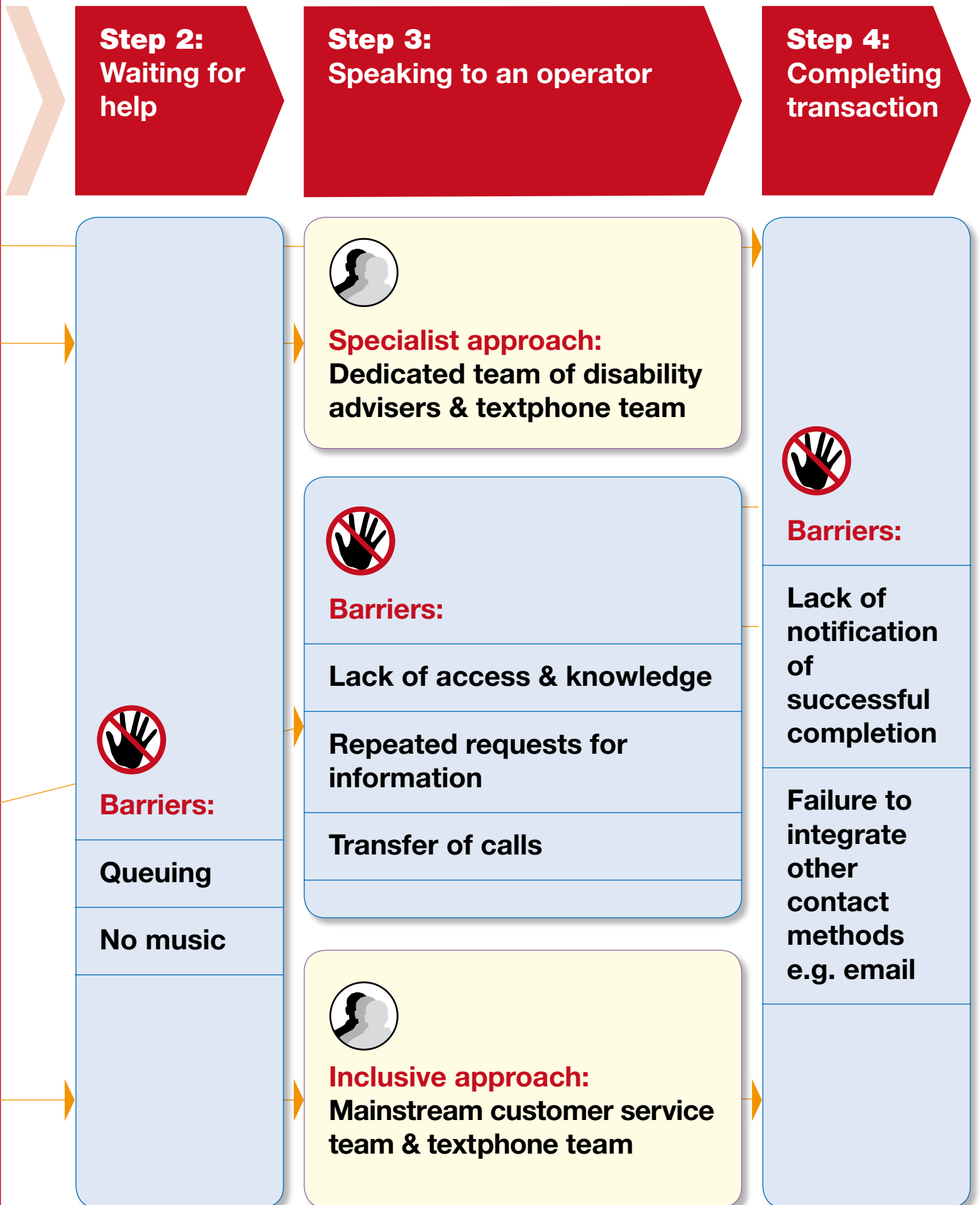
- Managing and promoting one number to all customers is more efficient and more sustainable in the long term.
- Designing a system from the perspective of all customers results in fewer complaints and fewer customer visits to branches.
- Providing parity in service for disabled customers is a legal and ethical obligation – Accessible call routing provides greater autonomy for disabled customers who want to use the telephone to manage their account.
- Training all staff to provide excellent service to disabled customers with different needs improves customer service for everyone.

A well-designed call routing system will meet the needs of a much wider population but it will not work for everyone. Make sure that you plan for and publicise alternative means of contact including your website, email address and postal address, as well as branch and self-service machine locations, where relevant.

Call routing: the customer 'journey'



Call routing: the customer 'journey'



The customer journey

Step 1: Negotiating the options

What are the barriers?

- too many options
- speed of options
- wording of options

Too many options

Call routing systems which have too many options cause confusion for customers and are a particular problem for people with memory loss, cognitive impairments and learning disabilities.

- Systems should have maximum of four options or 'items' in each menu.
- No more than three levels or 'sets' of options.
- If your system only has one level, then it is acceptable to have up to five options.

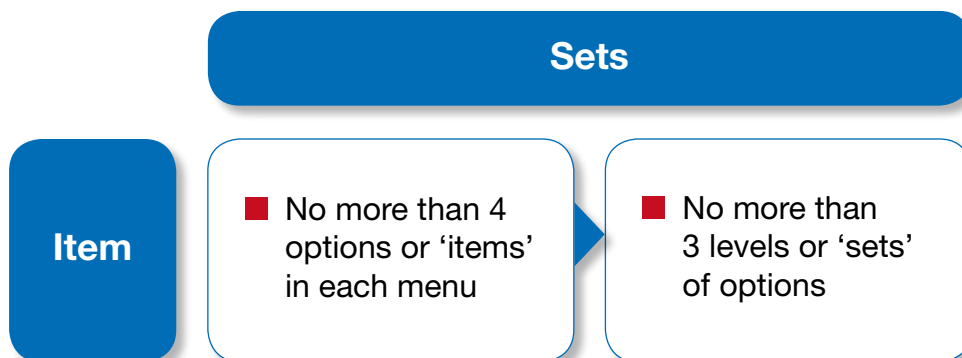
This will help your system to meet inclusive design guidelines which say that the capacity of short term memory works in 'information chunks' of seven items +/- two. More information than this is difficult for people to remember.

When it goes right...

"It was a relatively limited menu; it had about five options, I think. I was on hold for a very short amount of time. And I did get to speak to a person who did seem to understand the situation, who seemed to have the actual information at her fingertips. I was extremely impressed."

Customer with visual impairment

Best practice menu design



Speed of options

Options are often given too fast for customers to take in all the information and make the correct choice. This is particularly a problem for people with hearing impairments and older customers. In many cases the speed of options makes it almost impossible for textphone users to navigate call routing systems.

- Options should be given at a 'reasonable pace'.

A 'reasonable pace' is hard to define. The speed of options should be determined through user testing which should include people with a range of impairments.

- Always have a repeat facility. Best practice is for the repeat to occur automatically rather than relying on the customer selecting to hear the options again.
- Give customers two or three chances to select option.
- The system should transfer a caller to an operator if no option is chosen – this should be applied consistently across the system.

Speech recognition systems

At present disabled customers have poor experience of speech recognition systems. However use of speech recognition is growing as technology improves and new options around natural language become available. Companies should consider the needs of disabled customers during the decision making process and include disabled people in user testing when adopting new technology.

Some factors to consider:

- People with hearing impairments and speech impairments have particular problems using speech recognition.
- There are potential benefits for customers with visual impairments and dexterity problems who find it difficult to use a keypad.
- Call routing systems should always support touch tone alongside speech.

The customer journey

Wording of options

- Option messages should be as short as possible. This is particularly important for older customers who find it more difficult to recall information which is embedded within longer messages²¹.
- Avoid jargon – use customer-friendly language. Make sure the meaning of the options is unambiguous.
- Use customer perspective – options should be based on why customers call, not organisational structure.
- Review options regularly checking usage and customer feedback.

Tip

Specialist design companies can work with you to help design menus and get the language right.

“The options steered you in nine different directions and the thing I called about wasn’t given as an option and I called twice to see if I had missed it. I never actually found what I wanted.”

Customer with a cognitive impairment, searching for their account balance

BT have recently reviewed their customer contact systems for both consumer and business customers.

Improvements include:

- Plain and simple language to assist customers with cognitive difficulties.
- Fewer options and sets to make the system easier to use for people with short term memory difficulties.
- Where a customer does not press a key, the options are automatically repeated.

- Where customers ‘appear’ to be having a difficulty and don’t select an option they are transferred to an operator.
- To help customers with hearing and cognitive impairments who have particular problems with queuing, BT use ring tone and update messages and at busy times on high volume routes an automatic ring-back option, with their place held in the queue, is available.

Speech recognition, which will help people with manual dexterity, is being trialled. Dual functionality means that people will also have the option to use their keypad.

Step 2: Waiting for help

What are the barriers?

- Queuing
- No music

Queuing

Queuing is, of course, not popular with any customer. However, it can cause additional problems to customers with memory problems, learning difficulties and mental health difficulties. A well designed call routing system should help reduce the time each caller has to wait by directing them to an appropriate adviser.

Where queuing cannot be avoided:

- Indicate where the customer is in the queue and the approximate time before the call will be answered – update the customer at reasonable intervals.
- Ensure the system is consistent.
- Provide music.

No music

Silence is particularly problematic for people with cognitive impairments and for people with hearing impairments, as it can be unclear whether the call is still connected.

- Avoid silence – have some sort of music.
- Do not have marketing / sales messages.
- Do not have beeps.

“I was on the phone to a company not so long ago... And the message was, ‘We are experiencing high call volume, please call again at another time.’ And they put the phone down on me. What! I need to speak to somebody now! And if you call back, it rings. It’s like, what’s all that about? I’m paying for a service and if I’m not getting a service...”

Customer with depression

²¹ Zajicek and Morrissey, 2001, Software Design for Older Adults to Support Memory Loss

The customer journey

Step 3: Speaking to an operator

What are the barriers?

- No access to an operator.
- Lack of disability knowledge.
- Repeated and unnecessary requests for information.
- Unhelpful transfer of calls.

Access to an operator

Best practice is for access to be available in two ways:

- Option to speak to an operator at the end of each 'set' of options.
- By holding after items have been presented.

Operator assistance should be provided as minimum for 'fail-safe' aspect of system – the customer should never have to hang up.

Understand your customers and why they are calling in order to provide access to an operator at the most appropriate points in the system.

"I hate calling cinemas; I don't like calling cinemas. All the cinemas in Birmingham will list the time and the film but none will put you through to an operator. And I haven't called the cinema for a long time and it's for that reason alone."

Customer with a hearing impairment, Birmingham

Fully automated systems

Most companies recognise the problems which fully automated systems can present to customers and choose to provide operator back-up of some sort. However, if you do have a fully automated system:

- explain clearly what the customer has to do and what information will be required from the majority of customers at the outset.
- if the caller does not respond, progressively provide more information to enable them to complete the call.
- provide advice on alternative contact options, for example website or email access.

Failure to provide access to an operator increases the likelihood that disabled customers may abandon a call and choose not to call in the future.

Tip

Systems are available which can detect a caller who is 'stuck' and direct them to an operator.

Advisers lack disability knowledge

All customer service staff should receive disability awareness training. Even if you have a specialist team, many disabled customers will prefer to contact your mainstream number.

What are the basics that your staff need to know?

- Ensure staff understand your legal obligations and commitment to excellent customer service for disabled customers.
- Provide basic information on communicating with disabled people over the telephone and textphone.
- Use intranets to provide staff with information on disability and services/ adjustments available for disabled customers.
- Provide clear policies on confidentiality and capacity for disabled customers who need friends and family members to help them complete a call.

When talking to disabled people on the telephone:

- speak clearly and directly into the microphone.
- don't speak too quickly.
- always be ready to repeat or rephrase.
- give the person time to explain fully – don't interrupt.
- concentrate on the content not the voice.
- if you can't understand, ask the person to repeat what has been said.
- check the caller has understood you.
- if a person has a stammer, don't finish their words or guess the end of the sentence.
- be aware that some customers may contact you by telephone through an operator (TextDirect) or using a textphone.

These tips are taken from 'Welcoming disabled customers', guidance for customer facing staff produced by the Employers' Forum on Disability.

The customer journey

Avoid unnecessary requests for information

Repeated requests for information are frustrating, confusing and cause customers to question the purpose of the call routing system.

- Make sure that requests for information are relevant and not intrusive.
- Ensure that information collected during call routing process can be accessed and used by the operator.
- Enable staff to access and share as much information as reasonable.

Transfers

Disabled customers recognise that one of the benefits of call routing is to reduce the number of times they have to be transferred. However being transferred to multiple advisers, getting lost in the system and being cut off is still a common and frustrating experience.

- Never transfer customers back into the call routing system.
- If possible, transfer customers to the correct agent and inform them of the customers' needs.
- Customers should be told where and why they are being transferred.
- Where transfers are not possible the customer should be given the correct alternative number to call.

Many customers with hearing impairments, visual impairments and learning impairments find it difficult to hear, take down or remember numbers. If a call routing system does not allow for transfer of calls, consider providing the option for advisers to email or text numbers to customers.

It is best practice to include a repeat facility at points where the customer may need to write down information, e.g. a phone number.

Larger organisations which have multiple business areas using different technology, may find supporting effective transfers for customers difficult to do. The ability to transfer calls should be planned for future systems and adjustments put in place for disabled customers until this is possible.

“I don't think there's a need for me to be putting in my national insurance number, date of birth and everything when I phone them. I just don't think there's any need for it, because they ask for all that information when you get through to them. It just annoys me.”

Customer with cognitive impairment

Tip

The majority of systems have simple functionality to support transfers and to show whether a call has been successfully delivered.

Step 4: Completing the transaction

What are the barriers?

- Lack of notification of the completion of a transaction.
- Failure to integrate other contact methods.

Notification of completion of transaction

The successful completion of a task or transaction should be clearly stated by both automated systems and operators.

- Advisers should always confirm with the customer that the call is completed.
- Automated systems should have a message at end telling customer transaction completed.
- A best practice message will tell the customer not only that the transaction is complete but that they are free to end the call. A key press option – e.g. press 9 to end the call – can also be given.

Integration of other contact methods

Disabled and older customers, like other groups, prefer to have a choice of a range of ways to contact a business. Some hearing impaired customers in particular find email a helpful option.

- Email, SMS text, postal response or follow-up to calls should be an option for contact centre staff – this is particularly helpful for customers who have difficulty in taking down numbers or other detailed information.
- Customer satisfaction with response should be monitored.
- Beware asking customers to call back in response to an email – this is not helpful to customers who have difficulty using the phone!
- Ensure customers have a range of contact methods available, including access to promotions and special offers
- Best practice is to provide a choice of email and SMS text responses as an integrated element of the call routing system.

Tip

Systems are available which can transfer customer to adviser if they are unsure whether their transaction has been completed successfully.

Ensure customers are given a range of contact options, including where possible:

- telephone.
- email / internet.
- face-to-face.
- postal address.
- SMS text messages.
- textphone.

Meeting your legal obligations

The Disability Discrimination Act (1995) prohibits discrimination against disabled customers. It is unlawful for a service provider to treat a disabled person less favourably for a reason relating to their disability unless the treatment can be justified.

This means service providers must not:

- refuse to provide a service to a disabled person.
- provide the service on different terms.
- offer a lower level of service.

A service provider has a duty to alter any practice, policy or procedure which makes it impossible or unreasonably difficult for disabled people to use the service.

Where it is not possible to make a service accessible to a disabled person in the same way as non-disabled people, service providers must make services available by reasonable alternative means. A reasonable alternative is one that allows a disabled customer to receive a service that is as close as possible to that which people without that disability enjoy. Insisting that customers who cannot use your call routing system make transactions in person may not be reasonable or lawful.

Organisations which use call routing should ensure that disabled customers:

- are not excluded from accessing a service because of inaccessible call routing.
- do not have to pay more because it takes them longer to navigate the system or because staff are not trained to take textphone calls.
- do not receive a lower level of service due to poorly designed automated services such as balance checking.

However, a service provider may justify less favourable treatment if:

- the disabled person is incapable of entering into an agreement or giving informed consent.
- providing the service to the disabled person would mean not being able to provide the service at all.

Textphone numbers

- Phone calls should cost the same for both telephone and textphone users
- Textphone numbers should be staffed the same hours as telephone numbers

Reasonable adjustments

Service providers are required to make reasonable adjustments to enable a disabled person to access a service. The type of service being provided, the resources of the service provider and the impact on the disabled person will all be considered in determining what is 'reasonable'.

Examples of reasonable adjustments to call routing systems:

- **Changes to policies, practices and procedures** – e.g. providing a repeat facility in order to help customers with memory problems.
 - **or** allowing customers to choose between speech recognition and touch phone facilities.
 - **or** allowing customers to speak to an operator.
- **Providing auxiliary aids or services** – e.g. providing hearing impaired customers with the option to receive detailed information, such as telephone numbers, by text message.
- **Providing services by another means** – e.g. providing services in branch to help customers with learning disabilities who find using the telephone difficult. Remember: your branches need to be accessible.

Minimising the risk of purchasing call routing systems and outsourcing contact centres

Many companies choose to outsource all or part of their customer contact processes and call routing systems to different suppliers. Ensure that your partners do not put you at risk, either of breaking the law or of losing valuable business from older and disabled customers. Ensure that you build accessibility into your contracts with suppliers. If you fail to do this and find that the system is inaccessible you may need to make retrospective changes which are likely to be costly.

Putting together an action plan

- 1** Identify the business functions and managers which need to be involved in decision making and development. In most companies these will include: Contact centre director; Marketing, including customer experience managers and contact delivery specialists; Resource/capacity planning; Finance; Disability/special markets teams.

- 2** Put together your business case. Working with your disability champion and disability customer service teams, put together a business case for action, incorporating information on your customer base, benefits for the business and disabled people and estimated costs of improvements.

- 3** Understand your customers. Gather information on your older and disabled customers. Review customer complaints and identify any obvious problems which have a disability dimension.

- 4** Find out what is already being done or planned to improve the customer experience of your call routing system and ensure that the needs and views of disabled customers are incorporated.

- 5** Identify the barriers in your system using this guidance, any feedback from customers and research undertaken on general customer access identify what the key barriers within your system are likely to be.

- 6** Undertake a risk analysis – for example, are there vulnerable customers who cannot get essential information because the only access point is through your call routing system? Are you at legal risk because you are providing a lower level of service to disabled customers?

- 7** Identify quick wins and immediate changes which can be made to improve access. Speak to your suppliers/ the system manufacturers about what changes are possible within the limits of your current set-up.

Putting together an action plan

- 8** Seek advice from technical specialists and find out what further options are available with new technology. Enquire about what user-testing they have undertaken with disabled people and how other companies have used the technology.

- 9** Put in place a strategic plan for development. If you are commissioning a new system ensure that accessibility standards are built into your specification and that suppliers are aware of your commitment to excellent customer service for disabled people when they tender.

- 10** Undertake user testing, involving older and disabled people, including people with hearing impairments, visual impairments, dexterity impairments, cognitive impairments and people with learning disabilities. It is also essential that you include people who use textphones in user testing. If you are introducing speech recognition include people with speech impediments.

- 11** Engage disabled staff in user testing. Many companies engage colleagues in testing new systems. If you have a disabled staff network invite them to take part in testing.

- 12** Adopt a programme of continual improvement. Invite comments and suggestions for improvement from disabled customers and ensure that disabled customers' needs are built into future reviews and processes for commissioning new systems.

Ensure systems are designed from the customer's perspective, and include disabled customers in your analysis. Too often systems are designed to meet the company's needs not the customer's!

Help, advice and information

Citizens Advice

Tel: 020 7833 2181

Web: www.citizensadvice.org.uk

Web: www.adviceguide.org.uk

The Citizens Advice service helps people resolve their legal, money and other problems by providing free information and advice from nearly 3,400 locations, and by influencing policymakers.

Customer Contact Association

Tel: 0141 564 9010

Fax: 0141 564 9011

Email: cca@cca.org.uk

Web: www.cca.org.uk

CCA is the professional body for customer contact, supporting the continuous professional development of contact centres, and the people employed within them.

Disability Rights Commission

Tel: 08457 622 633

Textphone: 08457 622 644

Fax: 08457 778 878

Email: enquiry@drc-gb.org

Web: www.drc-gb.org/

The Disability Rights Commission is an independent public body which gives advice on the DDA and good practice to disabled people, employers and service providers.

Employers' Forum on Disability

Tel: 020 7403 3020

Fax: 020 7403 0404

Minicom: 020 7403 0040

Email: enquiries@employers-forum.co.uk

Web: www.employers-forum.co.uk

The Employers' Forum on Disability is the employers' body working to the mutual benefit of business and disabled people. The Forum works with its members to develop and promote best practice on all aspects of disability as it affects business.

Enterprise Integration Group

Tel: 01704 532 227

Website: www.eiginc.com

Enterprise Integration Group (EIG) provides specialist design services for touch tone and speech recognition telephone user interfaces. EIG consider the needs of disabled and older users in testing.

Hearing Concern

Tel: 020 7440 9871

Fax: 020 7440 9872

Textphone: 020 7440 9873

Web: www.hearingconcern.org.uk

Hearing Concern is a national charity dedicated to improving the quality of life for people who are deaf or hard of hearing.

Ofcom

Tel: 020 7981 3000

Fax: 020 7981 3333

Textphone: 020 7981 3043

Web: www.ofcom.org.uk

Ofcom is the regulator for the UK communications industries, with responsibilities across television, radio, telecommunications and wireless communications services.

TAG

Fax: 01937 580 956

Email: tagenquiries@hotmail.com

Web: tagcomm.org.uk/contacts.htm

TAG promotes equality of access to electronic communications, including telecommunications and broadcasting, for deaf, deafened, hard-of-hearing, deafblind people and sign language users.

TypeTalk

Switchboard: 0151 709 9494

Fax: 0151 709 8119

Email: helpline@rnid-typetalk.org.uk

Web: www.typetalk.org

Typetalk and TextDirect provide a link to the hearing world for people with communications problems. Typetalk is managed by RNID and provides a range of services to organisations, including Typetalk relay and Relay Assist.



<p>You have inclusive accessible system, which works for everyone</p>	
--	--

Or

<p>While you work towards this, you have a specialist channel and adjustments are in place to meet the needs of people who cannot use the mainstream system</p>	
--	--

<p>You have a widely advertised dedicated number for people who use textphones. This number is well resourced with trained customer representatives</p>	
<p>Your call routing system presents customers with no more than three 'levels' of options with no more than four options in each 'set'</p>	
<p>Options are worded clearly and presented at a reasonable speed</p>	
<p>Customers who are in a queue are kept informed of their progress, with music while they are waiting</p>	
<p>Access to an operator is provided at the end of each 'set' of options</p>	
<p>Customers who hold or get 'lost' in the system are directed to the operator</p>	
<p>Operators and call centre advisers are fully trained in disability awareness and have access to policies on confidentiality for those customers who need help from friends and family to complete a call</p>	
<p>Your system enables easy transfers of calls and avoids repeated and unnecessary requests for information</p>	
<p>Customers are notified when they have successfully completed a transaction</p>	
<p>Procedures are in place to ensure that customers who have a difficulty with a call, can obtain the information they need by other means – email or SMS text messaging</p>	
<p>Call routing is only used as part of a comprehensive customer contact strategy which has been designed from the perspective of customers – including disabled customers</p>	



The Employers' Forum on Disability
Nutmeg House
60 Gainsford Street
London SE1 2NY
Tel: 020 7403 3020
Minicom: 020 7403 0040
Fax: 020 7403 0404
Email: enquiries@employers-forum.co.uk
Web: www.employers-forum.co.uk

The Gold Card Group

Abbey, B&Q, Barclays, BP, BSkyB, BT, BUPA, Camelot Group, Centrica, Cisco Systems, GlaxoSmithKline, Goldman Sachs International, HBoS, InterContinental Hotels Group, ITV, JGP, Land Securities Group, McDonald's Restaurants, Merck & Co, Merrill Lynch, Motability Operations, Netcare Healthcare UK, PricewaterhouseCoopers, Rockpools, Royal Bank of Scotland Group, Sainsbury's Supermarkets, ScottishPower, UnumProvident

BBC, Department for Transport, Department for Work and Pensions, HM Revenue & Customs, Jobcentre Plus, Learning and Skills Council, London Development Agency, Metropolitan Police Service, National Probation Service, NHS Scotland, Royal Mail Group, The Serious Organised Crime Agency, Transport for London

Endorsed by



Citizens Advice Bureau supports the call for barrier free call routing. Many of the 5 million problems which Bureaux deal with annually reveal the frustration experienced by disabled, older and vulnerable citizens who receive very poor customer service from call routing, call and contact centres.



Customer Contact Association is delighted to endorse this guide which seeks to make contact centres a welcome and accepted route for customers of every ability and assists organisations in developing that aim.

Disability Rights Commission

The Disability Rights Commission endorses this guidance from the Employers' Forum on Disability and hopes that it is used widely by companies both in the private and public sector to help them make their call routing systems as accessible and inclusive as possible.



Ofcom welcomes the publication of this guidance. Making it easier for customers to contact their service providers is good sense and obviously beneficial for both parties.

The production of these guidelines has also been supported by Hearing Concern, Ofcom, Royal Mail, Transport for London and Vertex.

Sponsored by



Alternative formats of this publication are available from the Employers' Forum on Disability.