



Public and
Commercial
Services Union



What's New?

Members' Briefing REVENUE & CUSTOMS GROUP

To: **All Members**

cc: **Branch Secretaries, Group Executive Committee, Equality Chairs, VOAC** (for info)

Can this Briefing be circulated via HMRC IT systems: **YES**

Website: **YES**

Action to be taken: **For the attention of all members in BT&C**

Date: **23 December 2022**

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BENCHMARKING IN BT&C

- **Team Benchmarks overview**
 - **How Team Benchmarks are calculated**
- **How Team Benchmarks should and shouldn't be used**
 - **How to escalate any issues or concerns**

Team Benchmarks Overview

Earlier this year, PCS held discussions with leaders in Customer Services Group (CSG) about their aims to reintroduce and relaunch individual targets. PCS clearly stated our opposition to this. As an alternative, CSG agreed to work with PCS on a model to introduce Team Benchmarks. This would initially be piloted in Benefits and Credits and evaluated before rolling it out wider in CSG.

PCS reviewed the launch materials and provided feedback on the approach. Our aim was to introduce a culture where performance discussions are balanced and supportive. We wanted HMRC to avoid introducing individual Key Performance Indicators (KPI's) as we had concerns that this could lead to micromanagement.

How are team benchmarks calculated?

Finance, Performance & Planning (FP&P) calculate average benchmarks data for tasks based upon actual productivity calculated from previous performance data.

Team leaders have the opportunity and discretion to review the benchmarking data before deciding on what the benchmarking figure should be for their team. A number of factors will need to be taken into consideration, such as:

- any reasonable adjustments
- part-time working patterns
- the experience of the team
- any non-customer facing roles team members may have

Team leaders should then create appropriate benchmarks or goals for their team. All team members can expect to be involved in these conversations. Working together to shape realistic plans and contributing to the delivery of goals overall. Where new tasks are introduced, team benchmarks will work towards the expected productivity over a period of time.

How team benchmarks should be used

If a team is regularly not meeting the benchmark, managers should discuss this with their team. These discussions should be conducted in a supportive way, using a coaching approach.

All colleagues should feel that they work in a psychologically safe environment. Psychological safety is the belief that you won't be punished for speaking up, suggesting new ideas or trying something different, or for making mistakes. It forms a key part of helping leaders and managers create the innovative, supportive, and respectful culture HMRC aspires to.

Those who actually do the job, day in and day out, are usually in the best position to identify what is working well, and what isn't. So, if a team isn't regularly meeting the benchmark, it's important that team members help identify the reasons for this. For example:

- there might be a higher proportion of complex cases
- the benchmark might not be achievable if the case is to be worked to the standard required to achieve HMRC's quality goals
- the process might have changed, or additional steps might be needed to ensure cases are worked in line with a 'once and done' approach
- additional learning or technical support might be required
- There may be individuals on the team with reasonable adjustments. This should never be discussed with the wider team. However, team leaders should take this into account when deciding what benchmark figure the team can realistically achieve
- There might be individuals on the team who have non-customer facing roles. For example, as a floorwalker, a digital ambassador, a firefighter, or a trade union rep. Due to the nature of these roles, the time spent off task can't always be planned for. Some of these roles might also mean that colleagues spend more than 20% of their working time off task
- When FP&P and directorates review the KPI for a task for planning purposes, they look at historic gross productivity data. However, we need to be mindful that in effect, gross productivity represents the average number of cases cleared if colleagues were spending 100% of their time working on the task, without a break. We know staff do not spend 100% of their time direct on task and that is taken into account when determining resource requirements across work areas. That's why it's important the team leader looks at the gross benchmark and works with their team to try and take the various factors mentioned above into consideration before coming up with a realistic and achievable team goal.
- We also need to be mindful that for an average number to be an average, there will always be numbers below it and above it. The figure can't remain an average if everyone achieves above it.
- There may also be weeks when teams achieve less than the benchmark. For example:
 - during times when colleagues with off-line duties spend more time than expected working off-task.
 - when individuals on the team are struggling with personal issues or health related issues. These things won't necessarily be visible to rest of the team for confidentiality reasons. So, in these instances, if the manager is aware that there are confidential factors contributing to a dip in the team's performance, they shouldn't need to have a discussion with the team.
- We are all individuals and have different strengths, abilities, and skills. That's what makes us unique and creates diversity in a team. Some colleagues naturally work at a fast pace whilst others need to take more time. Everyone should be equally valued for what they bring to the team.

Equally, if a team is regularly surpassing the Benchmark, this should also be discussed in a supportive way. Is the quality of the work at the right level? If it is, can we identify any best practice that can be shared with other teams? However, it might just be that the team are more experienced, or naturally faster at working cases. Again, this comes back to the logic that for an average to be an average, some colleagues will do more than the average, and some colleagues will do less.

Team Benchmarks vs Personal Targets

Team benchmarks are not intended to be solely about productivity. They are being introduced to ensure the delivery of good customer service overall. Previously, Key Performance Indicators (KPI's) concentrated mostly on clearance rates or whether targets were met.

Team Benchmarks are intended to reflect the all-round performance, quality, and consistency of customer service. The intention is to encourage teams to work together to look at how they can continuously improve their customer service.

This change of culture brings opportunities to Team Leaders. They are empowered to work with their teams to create their own plans. This also brings greater discretion in how they effectively deliver tasks. Previously, many managers presented average clearance targets for a particular task. Now they have the opportunity and autonomy to shape their own goals. Managers are in the best position to understand the strengths within their teams. They're also in the best position to identify any support and coaching their team needs to deliver the best possible customer service.

CSG's commitment to the principles of the MIS Agreement

On 2nd June 2021, CSG published a [joint intranet statement](#) with PCS and ARC. This confirmed that CSG remain committed to following the spirit of the mis agreement. The principles of the MIS agreement are nothing more than a roadmap to positive management and staff engagement and following the agreement's principles leads to a better working environment.

How to escalate any issues or concerns

If PCS members, including line managers, have any concerns about how Benchmarking is being rolled out, they should discuss this with their manager or local PCS rep in the first instance. If PCS reps are unable to resolve issues locally, they will escalate it to the National PCS BT&C team. We will then work with senior leaders to overcome these issues.

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JOHN SMITH
PCS National Lead for BT&C

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