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*Innovation in communications*

# THE NEW CONTACT CENTRE: a single portal for all Dissemination and Communication services of Istat

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## Introduction

The Italian National Institute of Statistics has long been providing a series of digital services to meet the needs of citizens, researchers, businesses, journalists and institutional actors, particularly in terms of data dissemination, statistical information search assistance, survey respondent support.

In the past, it was difficult to find a single point of contact for all these needs. In essence, Istat transferred its complexity on its users, who often dealt with it in different ways depending on the service they needed. However, it became recently clear that a single point of contact was necessary and that it was time to try to realize it, given the changes in technology, communication channels and information literacy.

It has never been an issue to have multiple access channels to Istat (email, phone, website, etc.). In fact, Italian citizens are accustomed to use different tools such as telephone, social media, web platforms, instant messaging and chatbots to communicate with both public and private entities.

However, by offering a set of different channels managed by different operators, Istat was faced with a complex and sometimes redundant management of requests and ways to communicate with users, risking an unstructured use of the different tools.

The design of the new Contact Centre was therefore conceived to facilitate interaction with users and to coordinate resources for communication and dissemination activities.

The new platform was thus launched in 2022 with the aim of offering a unified and integrated service to all those who contact Istat to request assistance in finding data and/or customized support, to purchase printed volumes or to carry out historical and bibliographical research.

In addition, researchers can access microdata for study and research or scientific purposes through the Contact Centre, in compliance with current regulations.

Moreover, through Contact it is now possible to send requests about the Institute, its activities and surveys and to contact Istat to report technical problems with its web platforms or to provide feedback for service improvement.

The new platform, designed to comply with Italian laws regarding Privacy, Accessibility and Authentication, allows for the structured management of inquiries and service requests. This allows the operator to easily route requests to the most appropriate service, simplifying the customer journey by eliminating the need to repeat personal and billing information.

The most important part of this process, however, is that the Contact Centre will continue to evolve and integrate new features and tools. For example, implementing Artificial Intelligence to help users and make troubleshooting more efficient for operators, but also the integration of a section for survey respondents, from which Istat will start to collect data.

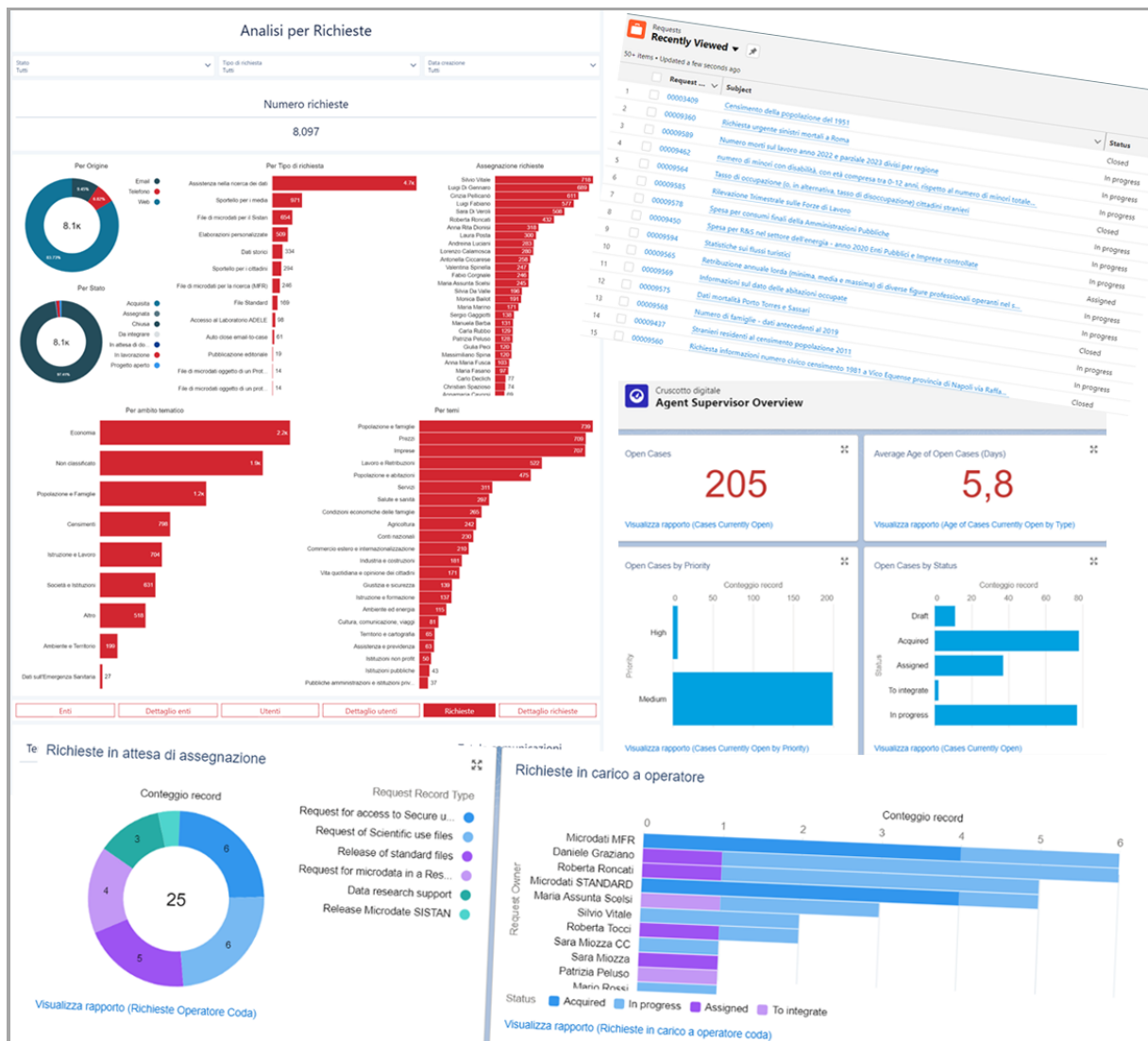
# 1. An overview of the new project

## 1.1 Two systems for one service

Istat Contact Centre consists of two different and integrated platforms.

One is the *Operator Console*. This is the back-end platform used by operators to handle user requests. It records all communications, file exchanges, ticket numbers, request information and processing status. The Console improves the overall quality of service and reduces request processing time by providing operators with flexible work management, handling any type of request regardless of the incoming channel (web or email). It also allows the integrated management of each processing at all stages of its lifecycle.

### The operator console with the main features



The second platform is the *front-end portal*. It is the website <https://contact.istat.it>, where user can open a request and interact with operators, ask questions and receive information and files. The website has been developed following an analysis of user needs. In fact, this has a direct impact on the way Istat is seen and experienced by users. There is a differentiated path and a detailed descriptive and informative section for each of the services offered on the website. Each request has a serial number, and the operator will work on it until it has been satisfied.

### The home page of the website for users

The screenshot shows the Istat CONTACT CENTRE website. At the top, there is a navigation menu (hamburger icon), the Istat logo, and the text 'CONTACT CENTRE' with a 'login' button. Below this is a banner with the text: 'Through Istat Contact Centre you can ask for support in searching data and obtain information about the institute and its activity. The staff reply in the shortest possible time and provide you assistance and support tailored to your need.' A search bar is positioned on the right side of the banner with the placeholder text 'Search your service'.

The main content area features eight service tiles arranged in two rows of four. Each tile contains an icon, a title, a brief description, a 'more info' link, and a 'select >' button.

- Data research support:** Information and support in accessing and using data.
- Release of microdata:** Microdata for scientific purposes and access to Safe centre.
- Custom data processing:** Provision of custom data processing on a fee basis.
- Eurostat user support:** Support in the search for European harmonised data.
- Historical data:** Support for historical and bibliographical research.
- Publications:** Information and purchase of printed volumes.
- Media Relations Office:** Support for articles, interviews, TV and radio broadcasts.
- Users relations:** Information on services and surveys; complaints and reports.

The footer section contains three articles:

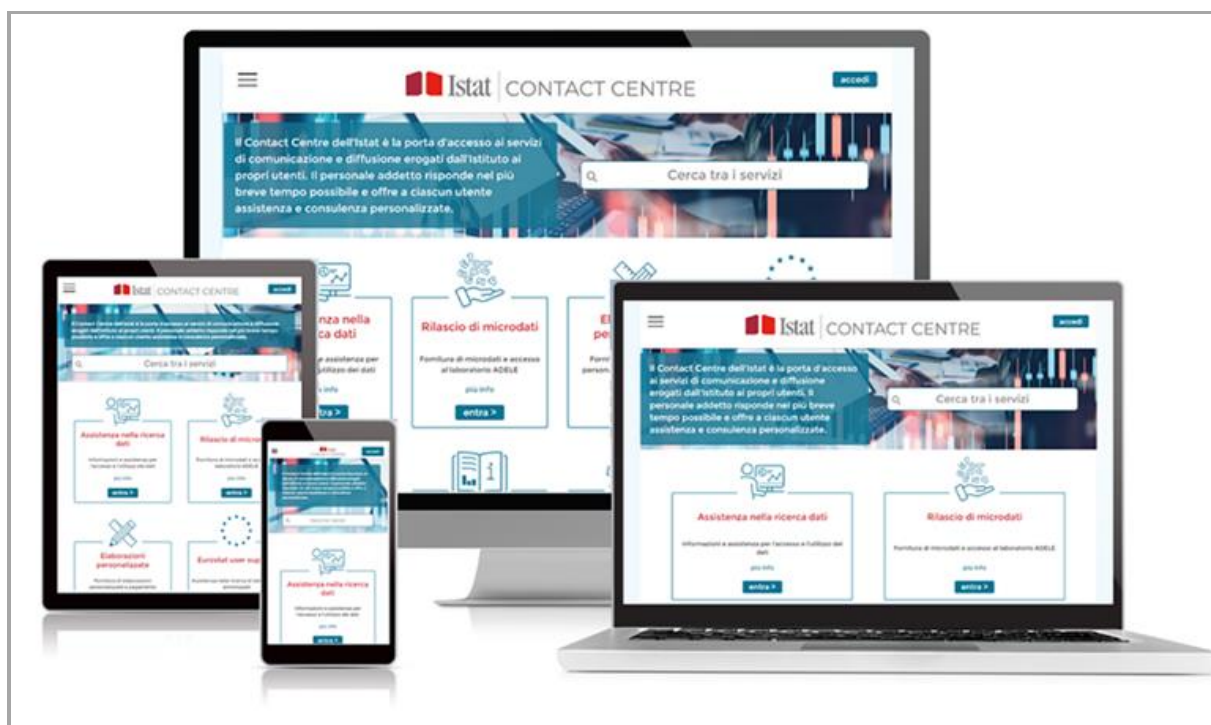
- Data sources on deaths and causes of death in Italy:** Istat produces and disseminates mortality statistics on the basis of different sources, each with its own purpose. Here we see what they are.
- Rents and ex-spouse benefits: how to calculate the revaluation:** A web-based system allows the calculation and certification of percentage changes in the Consumer Price Index for blue- and white-collar households used to revalue rents and maintenance benefits. Here an Italian-language guide for using the system.
- Causes of death: where to find data produced by Istat:** How many deaths occur in Italy each year? What are the leading causes? What about multiple ones? Here are some guidance on where to find data to municipal level.

Additional footer links include 'Things to know about Contact Centre services' and 'How to open compressed and encrypted microdata files'.

## 1.2 The services offered

The Contact Centre offers eight services to users: data research support (a separate channel for European data); release of microdata; custom data processing for a fee; historical, bibliographic and archival research assistance; purchase of printed volumes; assistance to journalists and assistance to citizens for general inquiries about the organization, submission of suggestions or complaints. All these services are provided both in Italian and English.

### Responsiveness: the Contact Centre website on different desktop, laptop and mobile devices



In detail:

1. "Data Search Assistance" provides users with support to find data, clarify database navigation paths, obtain methodological information, update maintenance allowances and rents, report data errors or inconsistencies. The operators of the assistance services are specialized for matters and distributed all over Italy.
2. Istat provides free microdata files from its surveys through the "microdata release" service. All types of microdata, without direct identification of the responding statistical units, are released for study and research or scientific purposes. Once the conditions for accessing the microdata have been checked, it is possible to fill in the online form and request all types of microdata files, as well as to access the Istat ADELE Laboratory to request secure use files.
3. The "custom data processing" service responds to specific needs for statistical information produced by Istat but never disseminated. This type of processing involves additional work.

Therefore, a fee is charged. The "Price Resolution" determines the cost of each processing. It refers to the human, hardware and software resources required to produce the requested processing.

4. Istat offers assistance in the search for harmonized European data through the "Eurostat user support", which provides comparable statistical data on the Member States of the European Union. Istat manages the Italian language part of the service available on the Eurostat platform in compliance with the quality standards established at EU level.
5. "Historical Data" offers support for historical, bibliographical and archival research. The operators of the Istat Central Library provide this service in addition to the reception and direct assistance. For specific needs, users can request the digitization of a book or part of it, or the customized processing of historical data; both services are subject to a fee.
6. "Publication" is the service to purchase only the print volumes Istat produces available to buy. On the other hand, the Istat website and the Central Library and Statistical Information Centres offer free access to all production and research work and to the results of studies on official statistics.
7. The "Media Relations Office" provides support for editorial initiatives, articles and radio and television broadcasts. The staff of the Istat Press Office is at the disposal of journalists to respond to requests for data and insights on topics of interest. The service is available from Monday to Friday, from 9 am to 7 pm.
8. The "User relations" section allows users to: request information about the organization and activities of the Institute; request explanations about current surveys and assistance in accessing data collection platforms; provide feedback and suggestions for improving the service; report technical problems with the web pages; inquire about the license to use published statistics.

### **1.3 Features to support users**

The new Contact Centre was designed to ensure efficient and effective request handling for both operators and users, and to simplify relations between Institute operators and researchers.

The details of each service were fixed, the paths to which the user should be directed were studied, the processing step of each request was determined, and interactive forms were generated to make each service fully digitalised.

Specifically, the homepage offers two useful features to the user. The first one is the search bar, "Search your services", which helps to find the service by using the most commonly used words. The second is the Knowledge Area, a section for news, procedures and information about products and services. The goal is to guide users in the selection of the right service or, before that, in the decision of whether to proceed with a request (so-called "case deflection").

## Knowledge main page

The screenshot displays the 'Information and procedures' section of a knowledge portal. It features a search bar under 'FREE SEARCH', filter menus for 'SEARCH BY THEMES' (Health and healthcare, Population and families, Prices) and 'SEARCH BY TAGS' (Causes of death, Covid 19, Inflation, Microdata, Surveys, What to do for ...), and a 'Search' button. Three article snippets are visible:

- Data sources on deaths and causes of death in Italy**  
Istat produces and disseminates mortality statistics on the basis of different sources, each with its own purpose. Here we see what they are.  
DOCUMENT TYPE: Informazioni  
THEMES: Population and families; Health and healthcare  
TAGS: Causes of death  
47 views - 8/25/2023
- Rents and ex-spouse benefits: how to calculate the revaluation**  
A web-based system allows the calculation and certification of percentage changes in the Consumer Price Index for blue- and white-collar households used to revalue rents and maintenance benefits. Here an Italian-language guide for using the system.  
DOCUMENT TYPE: Informazioni  
THEMES: Prices  
TAGS: What to do for ..., Inflation  
229 views - 8/9/2023
- Causes of death: where to find data produced by Istat**  
How many deaths occur in Italy each year? What are the leading causes? What about multiple ones? Here are some guidance on where to find data to municipal level.  
DOCUMENT TYPE: Informazioni  
THEMES: Health and healthcare  
TAGS: Covid 19; Causes of death; Surveys  
444 views - 8/9/2023
- Things to know about Contact Centre services**  
Is this the first time you visit this website? Here you can ask for data, information, elaborations. It is possible to authenticate with SPID/CIE or register using UserId e Password. Response times are usually extremely fast.  
DOCUMENT TYPE: Informazioni  
TAGS: What to do for ...  
526 views - 3/21/2023

The portal has been integrated with the Istat Identity Provider to manage authentication with SPID or CIE (see next paragraph). The concept of "account" has been used to manage the register of public or private entities/companies, which is very important for billing and microdata requests.

Chatter is the interaction between operators and users: a kind of social network for information exchange and contact with users, providing them with information, files, links and answers.

A reporting system allows monitoring the operating parameters of the platform in order to increase the level of governance of the system. All reports are customized to the needs of the operators, navigable and able to "drill down" on the variables used.

### 1.4 Access and registration

Users can log in a variety of ways to access the Contact Centre services:

- authenticate by SPID or CIE, for all services;
- login by email and password for all services except microdata query;
- by email, only for journalists who contact the Media Relations Office.

The first two cases create an account and a restricted area on the platform, necessary for information exchange between operator and user and for processing requests. In the third one, the exchange between the user and the operator takes place exclusively via email, and neither



an account nor a restricted area is created. However, the system recognizes the user and displays the history of her/him requests if she/he decides to access the Contact Centre via SPID/CIE or registration using the same email address.

### Log in with SPID or CIE and with email and password

The image displays two side-by-side screenshots of the Istat Contact Centre login page. Both pages feature the Istat logo and the text 'CONTACT CENTRE'. The left page has two tabs: 'LOG IN WITH SPID OR CIE' (selected) and 'REGISTER TO LOG IN'. Below the tabs, it states: 'Italian citizen and foreign national living in Italy with a residence permit can access Istat services through the Digital Identity System (SPID) or the Electronic Identity Card (CIE). Access via SPID or CIE is mandatory for microdata requests only.' There are two links: 'Read more on SPID' and 'Read more on CIE'. A blue button labeled 'Entra con SPID o CIE' is present, along with a globe icon and the word 'Italiano'. The right page has the same tabs, but 'REGISTER TO LOG IN' is selected. It states: 'Foreign nationals residing abroad and without a valid identity document issued by Italian authorities can access Istat services through simple registration. Registration is also allowed for residents in Italy, with the exception of microdata requests for which access via SPID or CIE is required.' Below this is a 'Username' input field, a 'Password' input field, and a blue 'Login' button. There are also links for 'Forgot password?' and 'Register', and a globe icon with 'Italiano' at the bottom.

The first name, last name and email of the user, to which the social security number is added only for those who access the system via SPID or CIE, are stored in the system after the user logs in. The user reads a notice on the processing of personal data before logging into the system. In the case of users accessing via registration, the registration process is not started, and no data is recorded in the system until the user reads the policy and declares that she/he has read it by checking the appropriate box. However, if users log on using SPID or CIE, their personal information is sent directly to the Contact system during the login process; if the users do not check the box indicating that they have read the policy, their personal information (first name, surname, social security number, and e-mail) is deleted within 60 minutes.

For each user, personal data is made anonymous 18 months later the closure of their last ticket. Everything collected until then is removed from the system: first name, last name, email address, phone number, job title, social security number and billing information.

## 2. New services to access microdata

The microdata files of Istat surveys are sets of records that contain information on individuals, households, enterprises and institutions. They are a key instrument for assessing the impact of social and economic policies in Italy. The Italian National Institute of Statistics has always tried to widen the access microdata as much as possible, both in compliance with the legislation in force and with the regulation of the European Union.

In order to meet the growing demand for microdata from public institutions and scientific community, Istat provides several types of microdata files. These are designed to meet different information needs: Public Use Files (PUF), Standard Files, Scientific Use Files (SUF), Files for Sistan (National Statistical System) and Secure Use Files.

The new Contact Centre allows effective and efficient management of microdata requests and releases. It also enables Istat to respond to the various institutional needs for detailed thematic and territorial analyses. All this is done while respecting the protection of personal data and security.

The structured and integrated management of the requests and the release of microdata files, makes this service more transparent to users. This guarantees a high-quality service thanks to simplified procedures and workflows that are constantly reviewed to meet the needs of operators.

### 2.1 The release of microdata files by the Contact Centre

The different types of microdata Istat provides are released free of charge by the Contact Centre<sup>1</sup> and classified according to information content and portal accessibility.

The conditions for the release of microdata files are subject to the existence of requirements both subjective (with regard to the nature and organization of the requesters) and objective (with regard to the characteristics of the research project for which they are required). The release is also subject to signing specific agreements between the parties, in compliance with the current regulation.

Due to the nature of the data, the user must first authenticate to the portal with SPID or CIE<sup>2</sup> in order to access the Contact Centre and use the available services. In addition, the Register of public or private entity/company, which is already loaded on the portal, allows the user to see the basic information about the organization to which he/she belongs from the first access.

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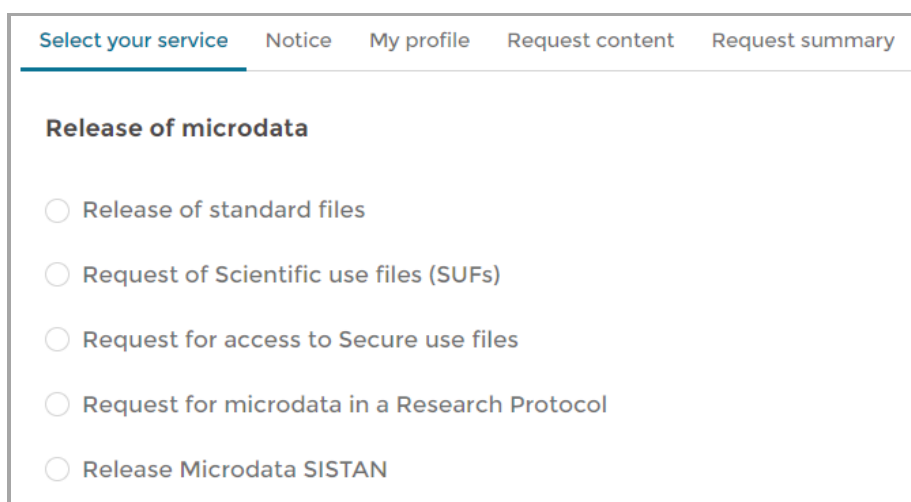
<sup>1</sup> With the exception of Public use files. Their acquisition is subject to registration (or authentication for registered users) in the dedicated area of the Istat website and acceptance of the conditions of use.

<sup>2</sup> Foreign users can still request microdata files from the Contact Centre if they do not have a SPID or CIE. They must manually or digitally sign the model and provide a copy of their identification document.

With Chatter, Istat operators can make direct comparisons on requests, with no need to use different tools to communicate, and they can easily get in touch with users, providing them with data files, clarifying and answering their requests.

By selecting the "release of microdata" service and filling in the online form, users can request all microdata files via the Contact Centre. The form allows the operators to collect the relevant information in order to evaluate the request and put it into the processing stage. If required, the Contact Centre platform is able to release the microdata files, which are encrypted in advance and protected by a password.

### The microdata release services on Istat Contact Centre



The screenshot shows a web interface with a navigation bar at the top containing five tabs: "Select your service" (which is underlined), "Notice", "My profile", "Request content", and "Request summary". Below the navigation bar, the heading "Release of microdata" is displayed. Underneath this heading, there is a list of five radio button options, each preceded by an empty circle:

- Release of standard files
- Request of Scientific use files (SUFs)
- Request for access to Secure use files
- Request for microdata in a Research Protocol
- Release Microdata SISTAN

## 2.2 The different types of microdata files

### 2.2.1 Standard files

Standard files are sets of records that relate to a small number of statistical surveys on individuals and households. They do not contain any direct identifiers and are processed using procedures that do not allow linking them to individual respondents. Compared to the source files, the confidentiality protection applied to these files partially limits their information content.

They have been disseminated since 1999, in accordance with the provisions of art. 10 paragraph 2 of Legislative Decree no. 322/1989, but no new Standard files are produced at present. They have been gradually replaced by the Scientific Use Files (SUFs).

Standard files are available for study and research purposes only to a limited number of professionals - typically university professors, researchers, research fellows, PhD students and master's students.

### **2.2.2 Scientific use files (SUFs)**

Scientific use files are sets of records with no record identifiers, which have been subject to control methods to guarantee the confidentiality of the statistical units. They are released for scientific purposes and they concern statistical surveys on individuals, households, enterprises and institutions.

Scientific use files contain more detailed information than Standard or Public use files. Therefore, the process to obtain them is more stringent, but improved by the Contact Centre, which allows users to make a request by filling out the online form.

Since 2010 Istat has been disseminated the SUFs, in accordance with art. 6 of the Commission Regulation (EC) No. 831/2002, which introduced the access to "anonymized microdata" and was later replaced by the subsequent Regulation (EU) No. 557/2013 on the access to confidential data for scientific purposes. This matter is also regulated by art. 5-ter of Legislative Decree No. 33/2013 (introduced by Legislative Decree No. 97/2016), which adopted the Guidelines on access for scientific purposes to the elementary data of the Italian National System (Comstat Directive No. 11/2018).

Scientific use files may be requested by researchers belonging to bodies recognized as research institutes by Comstat or included in the list of the research institutes recognized by Eurostat, exclusively for carrying out specific research projects. In the absence of such a requirement, it will be necessary to start, as a matter of priority, the procedure for the recognition of the body in question.

The request for microdata files has to be submitted in a formal way through the Contact Centre. The request consists of the research proposal, the confidentiality statement of both the principal researcher and the individual researchers involved in the project and an additional certification in the case of joint projects between two or more institutions.

Unlike before, the Contact Centre now allows users to enter the basic information online. The portal automatically generates all the documentation necessary for Istat to evaluate and then release the microdata.

At present, the microdata files are not released automatically: the operator takes the files from the Istat Microdata Archive and attaches them to the request in the Contact Centre.

The Contact Centre will be integrated into the Istat Microdata Archive thanks to its great potential and the possibility of working in "agile" mode. As a result, by next year it will be possible to automatically retrieve files from the archive and send them to the user from the portal. Data security and confidentiality of statistical units will be guaranteed.

### **2.2.3 Files for Sistan**

The National Statistical System (SISTAN) is the network of public/private bodies providing Italy and international bodies with official statistics (D.lgs. 322/1989).

Istat plays a leading and coordinating role within SISTAN. It is responsible for promoting and providing technical assistance to the statistical activities of the institutions and offices that are

part of it, with the support of the Coordinating Committee for Statistical Information (COMSTAT).

Files for Sistan are a special type of microdata files made available only to bodies or statistical offices belonging to the National Statistical System (Directive No. 9/Comstat of April 20, 2004). They generally request these microdata files with a dual purpose: i) to carry out surveys, statistical analyses and research projects included in the National Statistical Programme (PSN); ii) to carry out statistical processing related to the institutional activity or territorial aspect of the body.

File for Sistan are collected for statistical purposes and they are not subject to further statistical disclosure controls. Only in exceptional cases, when it is absolutely and strictly necessary to achieve the objectives set, personal data with identifiers may be released. The request to access the files for Sistan must clearly state the nature of the data, the subject matter and the purpose of the request.

The recognition of users happens automatically through the Istat Contact Centre, using the Register of public or private entity/company. It is directly connected to Sistan portal and regularly updated with new entries, new names, new roles, new addresses, new e-mails and so on.

The system can be accessed via SPID or CIE by the head of the statistical office of the organization or by one of his delegates. In both cases, the Istat operator can manage the request with maximum flexibility, updating the different statuses of the request (being processed, to be incorporated, awaiting the signature of the head, etc.) and communicating in real time with the users in case of missing forms or further requests to clarify the nature or purpose of the data requested.

The release of Sistan files is not yet automated, as for Scientific use files: the operator takes the files from the Istat Microdata archive and attaches them to the request in the Contact Centre.

#### **2.2.4 Secure Use Files - Elementary Data Analysis Laboratory (ADELE)**

The Elementary Data Analysis Laboratory (ADELE) is probably the microdata access tool that has been most affected by the innovations of the Contact Centre, especially in terms of research project management.

The ADELE Laboratory is a research data centre where researchers can access (physically or remotely) survey microdata to carry out, independently, statistical analyses on: i) microdata collected and validated by Istat through surveys of individuals, households, enterprises and institutions; ii) specific databases integrating different sources.

Istat Secure use files are not subject to any other methods of statistical disclosure control. In the request, it must be specified that the access is requested for scientific purposes and that the information already available from Istat through other tools is not enough for the achievement of the research objectives.

In the Laboratory, a strict control of the working methods and of the analysis results of the users guarantees the security of the data and the statistical confidentiality.

The access point does not allow in any way to i) exchange data outside of the protected connection, through Internet or Istat local network; ii) connect to external interfaces or printers; iii) install or remove any hardware or software; iv) perform data entry and retrieval operations; v) boot from CD-ROM, DVD-ROM etc.

Before authorizing the release of microdata, the final output produced by the researchers is checked by Istat, which verifies that the confidentiality of the statistical units is guaranteed. This is done in accordance with precise rules that Istat publishes on its institutional website and periodically updates in order to take into account new methods of data protection.

As for Scientific use files, access to Secure use files in ADELE Laboratory is regulated by art. 5-ter of Legislative Decree No. 33/2013 (introduced by Legislative Decree No. 97/2016), which adopted the Guidelines on access for scientific purposes to the elementary data of the Italian National System (Comstat Directive No. 11/2018).

The request for microdata files has to be submitted in a formal way through the Contact Centre. The request consists of the research proposal, the confidentiality statement of both the principal researcher and the individual researchers involved in the project and an additional certification in the case of joint projects between two or more institutions.

As for SUFs, Sicure use files may be requested by researchers belonging to bodies recognized as research institutes by Comstat or included in the list of research institutes recognized by Eurostat, exclusively for carrying out specific research projects. In the absence of such a requirement, it will be necessary to start, as a matter of priority, the procedure for the recognition of the body in question.

Before the new Contact Centre, the request for Secure use files and the management of the research project took place through a dedicated mailbox. This mailbox contained all the communication exchanges between Istat and the users. Today, the portal effectively and efficiently manages the entire process, from requesting access to the laboratory to releasing the output, opening a protected area where microdata is made available. In addition, the new Contact allows the creation of reports customized to the needs of the operators, whereas in the past the project life cycle was documented outside the system by manually updating Excel files and charts.

The starting point of the process is the online completion of the research proposal. The interactive form contains information necessary for the evaluation by the operators<sup>3</sup> and the authorization for release by the President of Istat.

Upon successful completion of the authorization process, the Contact Centre automatically assigns a progressive identifier to the project, identifies the researcher who will go to the laboratory for statistical analyses and provides him unique access to the workspace where the data is stored.

Currently, the release of the Secure Use files is not yet automated: the operator takes the files from the Istat Microdata archive and makes them available to the user in the working area. The great potential of the Contact Centre and the possibility of working in "agile" mode will allow it

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<sup>3</sup> Name of the principal researcher and of the individual researchers, title and description of the research project, microdata to be used, access point, duration of the project, statistical analysis methods to be used, expected results and benefits, modalities for disseminating the results produced.

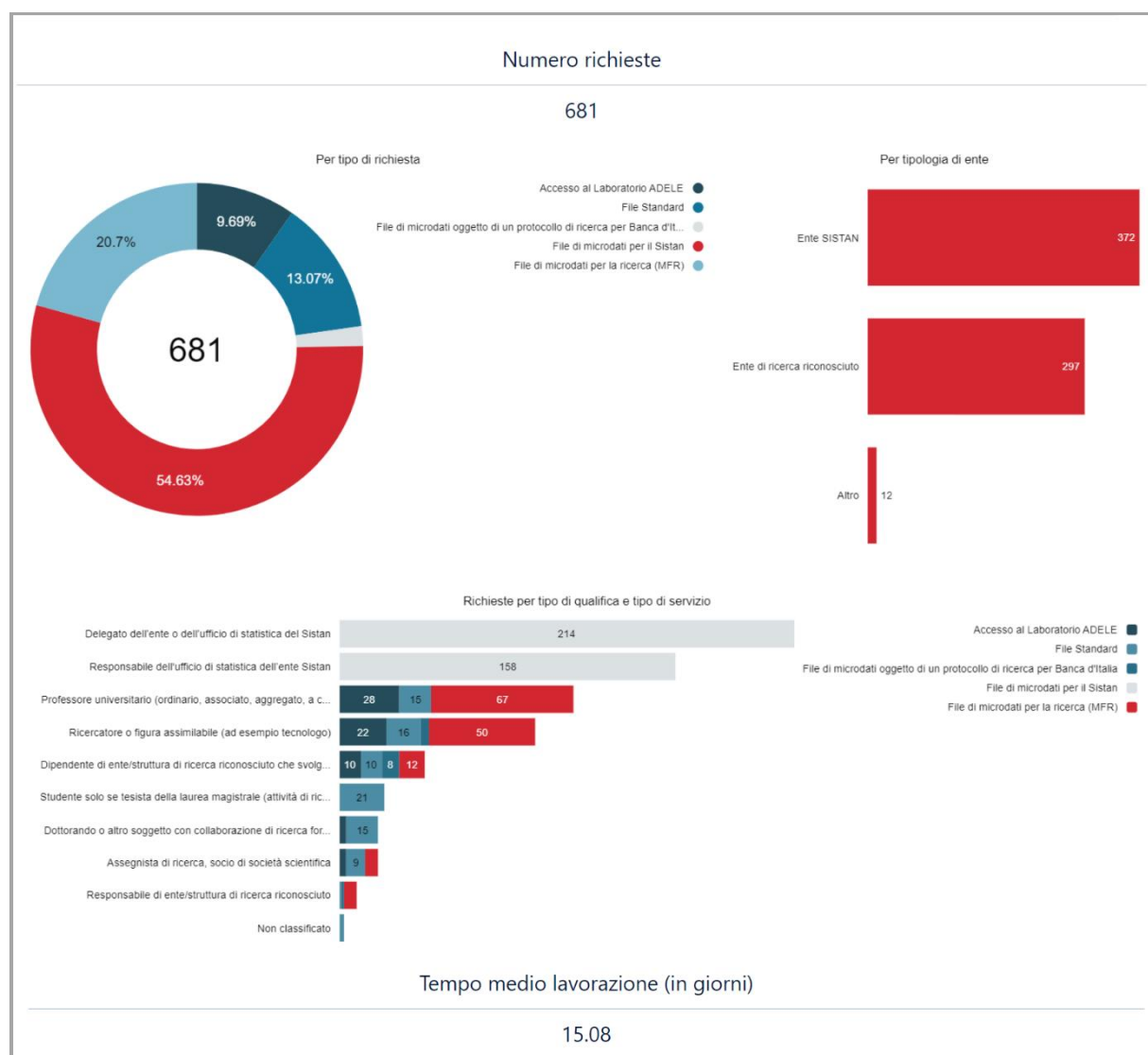
to be integrated with the archive. This will make the process flexible, fast, secure and time-saving.

When the Laboratory staff is ready to welcome the researchers the opening of the project is announced by two different e-mails, which are automatically sent via Contact Centre i) to the principal researcher and the individual researchers involved, as well as to Istat physical Laboratory that will welcome researchers; ii) to researcher who will have access to the Laboratory to whom personal access credentials will be given.

In short, this is a complete digital service that guarantees the accessibility and adequacy of the portal, making it more user-friendly for both operators and users. It also improves the relationships between them and other Istat offices.

### Dashboard for managing microdata requests

Number of microdata requests by file type, entity, user qualification and average processing time (1/1/2023 - 30/9/2023)



### 3. User relations: from email to an integrated service

In order to ensure the provision of quality services, Istat is committed to clearly defining to its users their rights and the characteristics of each of the dissemination and communication services that we offer them.

This is done through a specific 'Carta dei servizi', namely the document by which the Italian National Institute of Statistics, as a service provider, makes a series of commitments to its users (the document is available online via the institutional website and constantly updated).

The 'Carta dei servizi' also guarantees the methods and timing of the delivered services, enabling the possibility of complaints and possible refunds to users. Finally, the 'Carta dei servizi' emphasises the principle that User relations must be characterised by respect and courtesy, while the assistance offered is aimed at satisfying the users' requests as effectively as possible.

For several years now, Istat has been providing its users with a range of dissemination services through an on-line Contact Centre, in accordance with the "Carta dei servizi".

In May 2008, as a result of a highly innovative project at the time, the first Istat Contact Centre was activated. This was a web platform through which users could request statistical research assistance and personalized support. Not all dissemination and communication services available to users were included, however. In fact, until last year, both the User relations service (through which citizens, businesses and institutions could contact Istat for information on the organisation of the Institute and on surveys in progress, as well as for complaints and/or suggestions) and the print sales service were accessible only by e-mail.

In the spirit of continuous improvement, it was therefore decided not only to renew the technology of the Contact platform, but also, and above all, to extend the range of services offered to users.

The new portal now includes, in addition to all the other dissemination services, a communication activity dedicated to relations with the public, aimed specifically at responding to any request from the public that goes beyond simple assistance in the search for statistical data.

The service thus provides online support for the whole community to obtain general information about the Institute, to ask for help in finding documents, surveys, the site, to give feedback on how to improve the service, to send requests for the use of our logo or copyright and to make complaints.

#### 3.1 A little background

A channel for relations with citizens has been in place for years. In fact, it dates back to 2007, when the activity was launched and, after a short period of experimentation, put into operation.

At that time, the Dissemination and Communication Directorate of Istat was asked by the top management of the Institute to set up a channel of communication with the public.



The aim was to bring the Institute into line with the regulations in force at the time. With a view to a culture of administrative transparency and greater attention to the quality of services and the relationship between the institution and the public, these regulations provided for the creation of public relations offices (Legislative Decree no. 29 of 3 February 1993, article 12 - now article 11 of Legislative Decree no. 165 of 30 March 2001: establishment of Public Relations Offices to meet the dual requirement of the former Law no. 241 and no. 142 of 1990 to "guarantee administrative transparency and quality of service and to provide an organisational instrument suited to the needs of implementing the functions of institutional communication and contact with the public").

Law no. 150 of 7 June 2000 on communication and public information, which completed the regulatory evolution that began with the reforms of the 1990s, then identified these offices as the structures dedicated to communication activities with citizens.

Law no. 150 of 2000 finally assigned new functions to these structures, expanding their role and tasks, while reaffirming the general principles expressed in Legislative Decree no. 29/93.

In particular, Article 8 of Law 150/2000 requires the User relations offices to:

- ensure that citizens exercise their rights to information, access to documents and participation (Law 241 of 7 August 1990, as amended);
- facilitate the use of services offered to citizens, including information on legal and administrative provisions, as well as information on administrative structures and functions;
- promote the introduction of telematic interconnection systems, the coordination of citizens' networks, thus the promotion and management of on-line institutional communication;
- encourage citizen consultation and processes to monitor service quality and user satisfaction;
- promote and organise internal communication and ensure the exchange of information between the User relations office and other administrative structures;
- to promote inter-institutional communication by means of exchanges and co-operation between the User relations offices of other administrations, for example by setting up networks of contact persons.

The activities of this type of service can therefore be broken down into three macro-sectors:

1. information and performance: external communication, information activities on legislation and services provided by the public administration, ensuring the exercise of rights of access, participation, promotion of information on issues of general interest;
2. listening and verification: implementing processes to verify the quality of services and user satisfaction through listening and customer satisfaction surveys;
3. organisational: promoting telematic interconnection systems, coordinating citizens' networks, developing intra- and inter-institutional communication.

The structures dedicated to User relations in the public sector, as defined by legislation since the 1990s until the most recent provisions of the 2000s, must essentially be "offices able to perform several functions and to respond to a differentiated demand for services from citizens".

As such, they are an instrument of change for public administration.

To return to the experience of our Institute, until last November 2022 users could only access this service through the e-mail address [comunica@istat.it](mailto:comunica@istat.it), with all the limitations that an e-mail account entails, especially with regard to the reporting of services required by current regulations.

The evaluations that led to the inclusion of the service in the new Contact Centre were based on the further adaptation of the Institute to the evolution required by the sectoral regulations and to the growing need of the Dissemination and Communication Directorate of Istat to activate new ways of simplifying procedures and evaluating the quality of the services offered (performance of the latter in relation to the expectations of our users/citizens, to be realised also through user satisfaction surveys and their suggestions).

### **3.2 What's new in the User relations service**

Thanks to the integration of the User relations service, the new Istat Contact Centre can now provide a complete, unified and integrated response for researchers, academics, educators, companies, administrations, journalists, citizens and respondents.

They contact Istat not only for assistance in searching for data, but also to obtain information about the organization, activities and surveys of Istat, to report technical problems with the institutional web platforms or to provide feedback in order to improve the services provided.

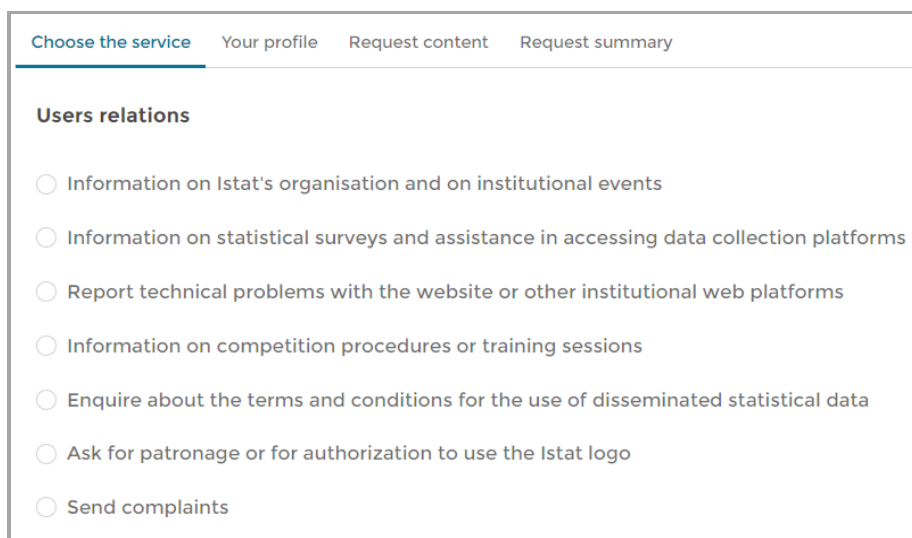
All this, of course, in line with the overall communication strategy of Istat and without forgetting the original purpose of the user relations e-mail address, which for years has ensured active interaction with people who felt the need to ask our institution about its activities.

The monitoring carried out to assess the quality of the new online User relations section shows that, from the outset, the new service meets a general information requirement that is highly appreciated by users and is clearly more structured and easier to measure than when these relations with the public were done through e-mail..

The most common types of messages received from users through this service are:

- questions about ongoing surveys, both from the point of view of the respondents and that of the researchers;
- requests for clarification about our survey participation requirements and procedures;
- reports of malfunctions of the site and the various web platforms that constitute its external interface;
- applications for professional collaboration through the submission of curricula vitae;
- applications for permission to publish Istat data (copyright);
- events sponsorship or logo use requests;
- questions relating to the results of a tender or contest that has already taken place;
- school visits;
- sending documents to complete the files for which the Human Resources Office is responsible.

## The User relations services on Istat Contact Centre



The screenshot shows a web interface with a navigation bar at the top containing four links: 'Choose the service' (highlighted with a blue underline), 'Your profile', 'Request content', and 'Request summary'. Below the navigation bar, the heading 'Users relations' is displayed. Underneath, there is a list of seven radio button options for selecting a service:

- Information on Istat's organisation and on institutional events
- Information on statistical surveys and assistance in accessing data collection platforms
- Report technical problems with the website or other institutional web platforms
- Information on competition procedures or training sessions
- Enquire about the terms and conditions for the use of disseminated statistical data
- Ask for patronage or for authorization to use the Istat logo
- Send complaints

It should be noted that this service fulfils a salutary mediation function in the case of complaints that are sometimes made by users against the Institute. This has resulted in all reported disputes being thoroughly investigated and effectively resolved, as evidenced by the various replies received from the users who initiated them. The process is based on cooperation between the Dissemination and Communication Directorate - which manages the User Relations Service - and the other Istat structures that are occasionally involved, cooperation that is often necessary to provide a concrete answer to the questions raised.

Specifically, these cases are related to messages criticising, protesting or polemicising the data published by the Institute. Sometimes, the complaint form available on the Istat website is also used for this purpose (in accordance with the Italian regulations in force for public administration websites).

It is also worth noting the growing number of users who, after an initial period of contact with the service, have become loyal to it. They have come to trust and value it and have returned to use it again and again.

Operationally, to access the User relations service within the Contact Centre the user, after registering, can submit her or his request by selecting from the subject areas the one that best suits her or his needs.

Each request is immediately assigned a progressive number and an operator assists the user and will continue to work on the request until the information requested is satisfied.

Front office staff therefore have a key role to play in the process of communicating with the external public. They have a dual role:

- a relationship-based role, involving the management of human relations and the ability to work effectively in a team to find the answers to users' individual questions;

- an operational role, which requires detailed knowledge of the process and working tools, therefore the ability to manage the process itself according to predetermined timetables. It also requires in-depth knowledge of one's own organisation.

The service, which is available in Italian and English, also allows users to avoid long waiting times (compared, for example, to traditional information desks, which are physically open only on certain days and at certain times).

It also simplifies the bureaucratic procedures for submitting requests. In fact, it is a single central point for the collection and sorting of applications as well as a single point of contact for users in relation to their specific information needs, which the operators of the User Relations Service forward to the relevant structures of the Institute.

### **3.3 Main benefits of integrating User relations in the new Contact Centre**

The benefits that Istat experiences with the User relations service within the Contact Centre are:

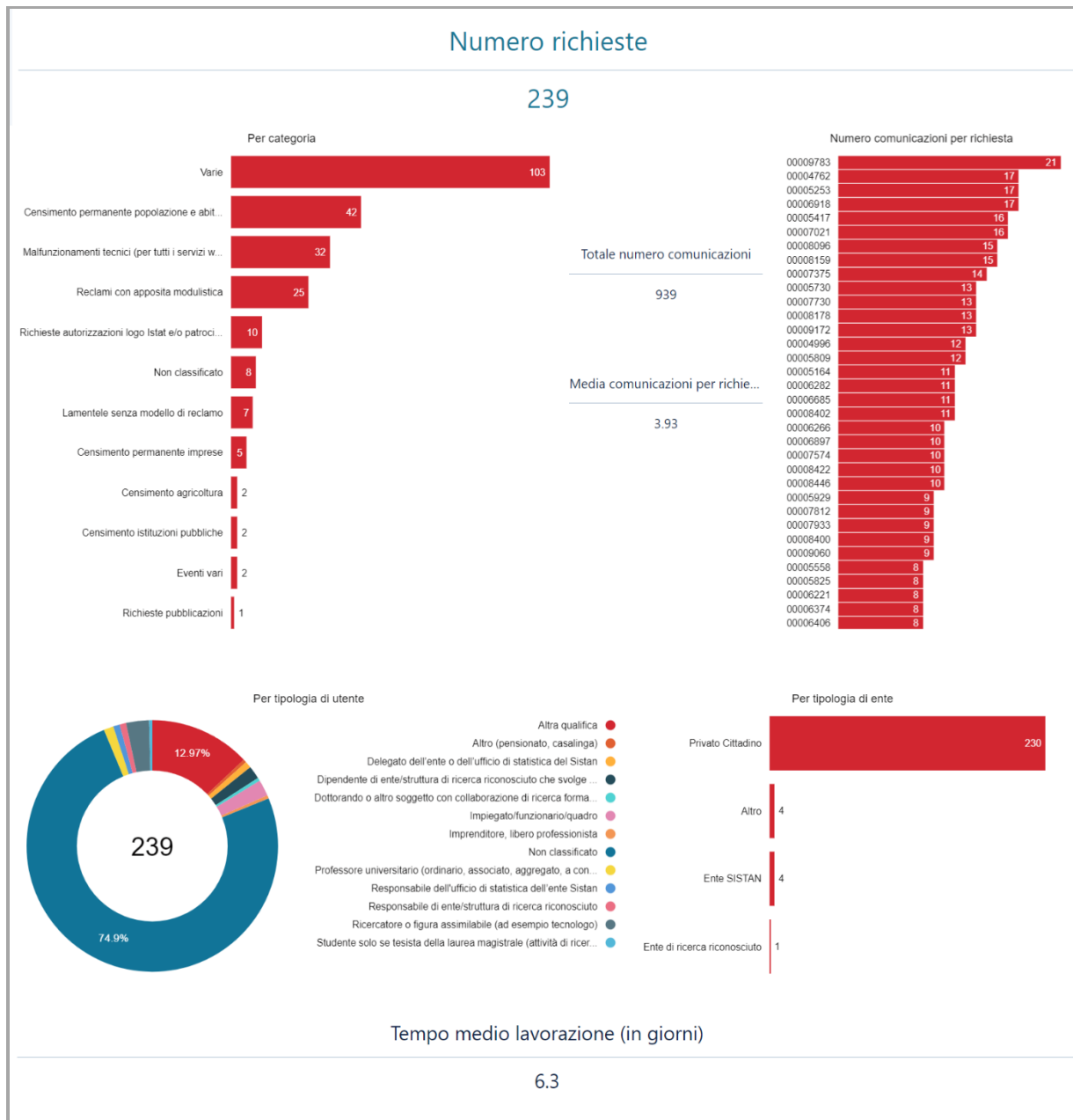
- **Saving time and money for everyone**, Istat and the users, since the online User relations service eliminates the need to travel and it consumes fewer environmental resources. It also reduces to a minimum the time away from work that users would otherwise have to take to visit the public offices that are open during office hours.
- **Objective simplification**, also from a logistical point of view, since services can be extended without geographical or spatial limitations. In an emergency, users can connect from anywhere, even if they are away on business or holiday.
- **Continuity of operations** in the event of an interruption in attendance due to exceptional circumstances (such as the COVID-19 emergency), or to allow responsible operators to work in agile mode.

To conclude, it is important to note that in this type of process technology is only an enabling factor, while the real added value lies in redesigning the service itself, using the new tools to build a completely new service, because:

***"(Seth Godin) Personalised service makes us feel like special people"***

## Dashboard for managing User relations

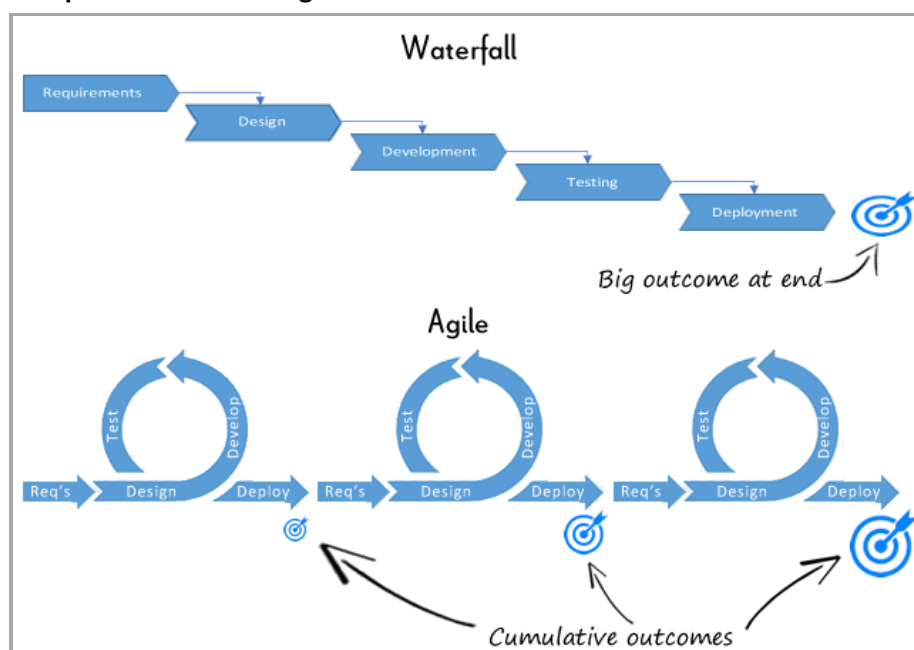
Number of requests by category, communication per request, user typology, entity and average processing time (1/1/2023 - 30/9/2023)



## 4. Next steps

The development of the new Contact Centre is being carried out using the "agile" method. This is an important innovation for Istat. The working method is iterative, incremental and goes beyond the traditional "waterfall": compared to a linear development process, agile is actually a lean and constantly adaptable process based on individual development phases, called sprints, to divide a complex problem into phases and to incorporate, starting from an initial version, more and more functionalities. In each sprint, the new functionality is analyzed, then developed, tested and finally the result is released.

### Comparison between 'agile' and 'waterfall' methods



The agile method involves an adaptive work plan and the direct and continuous involvement of the client (in this case Istat). The basic idea is that the level of efficiency of processes and the quality of services must gradually increase over time through project changes.

To manage the work, Istat used the Jira suite, which allows planning and creating roadmaps. Specifically, activities are organised and monitored using "ticket" elements, which can be of four types:

1. User Story (short requirements written from the point of view of the user);
2. Epic (a task consisting of several user stories, usually completed after several sprints);
3. Task (a job to be done);
4. Bug (a problem to be solved).

These elements are in the backlog, which is continuously modified and adapted according to the evolutions of the project.

## Example of a user story from the Jira backlog



Adopting the agile approach, with its daily meetings, three-week analysis-design-development-test-revision-publication timeframe and sprint reviews at the end of each process to assess whether the goal has been achieved, was an important change in the mindset of the Institute and one of the project's key outcomes.

This approach allows Istat to manage project developments in different directions: new communication channels and services, integration with existing Istat applications, monitoring and analysis of user service quality, implementation of Artificial Intelligence tools to support operators and improve customer satisfaction.

### 4.1 The use of Artificial Intelligence

The adoption of advanced solutions for user services is very common. In general, it is aimed not only at reducing costs, but above all at increasing the efficiency of the structure as a whole.

Istat, however, works differently, making the customer experience the main driver for the use of intelligent technologies.

Istat is in the process of implementing machine learning mechanisms that are applied to the Contact Centre for two purposes:

- provide information, FAQs, documents or links to access services of interest in a simple and intuitive way;
- keep the answers provided up to date and consistent.

A key goal of this new Contact Centre is to route users to the right service (or even operator) based on their type of enquiry, job role, professional profile and previous enquiries.

By guiding the operator to the most appropriate response, both sides benefit: the users, who benefit from up-to-date and consistent information; the operators, who can respond more quickly and focus their attention on more difficult and complex cases.

In this context, a trial was launched in spring 2023 to introduce a chatbot simulating a conversation with a contact centre operator. The chatbot asks the user to specify what they

are looking for in order to direct them to the most appropriate service or point them to the knowledge article that best answers their questions.

Thanks to its learning capability, the generated answers become increasingly accurate and consistent, with the goal of ensuring satisfactory service.

Once the chatbot is initialized, the learning phase begins and needs to be fine-tuned. A virtual communication system needs to be well designed: if the operator does not understand the questions, does not answer coherently, is slow or inaccurate, it can be useless or even frustrating in terms of satisfying the user.

## **4.2 The User satisfaction survey**

Taking users and their needs into account has a long tradition in public administration and, over time, the relationship between institutions and users has improved: users are no longer recipients of what the public administration does, but provide useful information to improve the quality of products and services.

Legislative Decree No. 74/2017 establishes the obligation of public administrations to evaluate their performances, also by involving citizens and users. It defines the systems for measuring satisfaction with the quality of the services provided in terms of usability, accessibility and timeliness.

In this context, Istat decided to listen to users' needs and measure their satisfaction in order to build an effective Content Relationship Management strategy, also for the development of the new Contact Centre.

The project is currently in the testing and refinement phase. When the ticket is closed, users will be able to answer a short questionnaire to provide an overall evaluation of the service and a more specific evaluation of the website, the ease of submitting a request, the clarity and completeness of the information received and the waiting time.

To evaluate the satisfaction, a scale with partial autonomy of meaning (Likert scale) was selected, based on four categories of statements that express an attitude from negative to positive: "very dissatisfied", "somewhat dissatisfied", "somewhat satisfied", "very satisfied".

The information collected will be used by Istat to improve the services it offers.



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