



customer MATTERS
News and insight from the Front Line

HOW WE COMPILED THIS BOOKLET AND HOW TO USE IT



These examples have been provided by leading practitioners of customer insight across the public sector. We were enormously encouraged by the response we received when we asked for good stories. If we haven't chosen your example for this publication it doesn't mean we didn't like it – simply that we have tried to pick a few stories which show the range of activity. We will be following up with further editions of the booklet so you will have more opportunities for showcasing the best examples of insight in the public sector.

We suggest you read through the topics and consider whether and how they apply to your organisation. The named contacts in this booklet are happy to talk with you in greater detail and supply further material, so please get in touch with them.

If you have suggestions of ways we could improve this publication, or make it easier for you to share experience, do please get in touch.

Introduction



The best service providers in the public, private and third sectors start by making sure they have a real, evidence based, understanding of the people they are trying to reach, including by engaging with them directly. Government's vision is to establish a culture and systems which make this routine.

This publication is a compilation of some of the best practice examples of ways in which public sector organisations are using customer insight to understand the needs and behaviours of their communities and service users.



Foreword

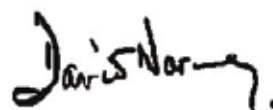
This booklet celebrates the pioneering work that is going on across the country to provide citizens and businesses with the excellent public services they deserve. It is a collection of great ideas: the tools, techniques and approaches that we are using to understand and respond to the needs and behaviours of the people we serve. Some of the examples here are cutting edge. Some are simple ideas, brilliantly executed. But each one is real and has been shown to work.

We wanted to bring these examples together for three reasons. Firstly, and most importantly, to recognise the passion and determination of those public servants who have risen to the service transformation challenge. We want them to know how important their work is. Secondly, to share these examples with a wider audience. Each story here is a response to a particular, often local, need, but each has lessons which can be used in other circumstances. Thirdly, to show that an understanding of the needs of citizens and businesses really is the key to delivering public services which are better for the customer, better for our staff, and (even more critical at the moment) better for the taxpayer.

For every example included, we have ten which we didn't have room for in this edition. If you find this publication useful – and do, please, let us know – then we will establish it as a regular feature. But my guess is that for each story we know about there are a hundred more. So I hope that you will continue to share experiences amongst yourselves.

Often service transformation is talked about in terms of large national projects. However, the shape and direction of many of these large projects has typically been formed by inputs from local small initiatives and field testing of process design. In Tell Us Once, for example, the process we are using today has been significantly reshaped by user inputs and staff feedback. The challenge we often face is to scale up local successes into nationwide victories. This publication aims to help you to play your part in meeting that challenge.

Most of us joined the public sector to improve outcomes for citizens and businesses. This booklet provides proven routes for doing just that. We look forward to hearing from you again soon. Your story can help inspire other public servants to demonstrate that customers matter.



*SIR DAVID VARNEY
Prime Minister's Adviser on Public
Service Transformation*

1.

CUSTOMER JOURNEY

MAPPING

Customer journey mapping is the process of tracking and describing all the experiences that customers have as they encounter a service or a set of services, taking into account not only what happens to them, but also their responses to their experiences.

1. CASE STUDY HMRC'S work on Customer Journeys and Total Cost to Serve



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3

CUSTOMER JOURNEYS

HMRC is using Customer Journeys to help identify areas for process improvement and to support culture change by using the customer perspective. They are using journeys in their pre-pensioner project to understand the issues customers face as they move into receiving a pension and how their processes may help or hinder. This approach resonates with frontline staff and managers at all levels – once they see journeys summarised they recognise the issues customers face and are keen to identify improvements to make it easier for customers and more efficient for HMRC.

TOTAL COST TO SERVE

Total Cost to Serve uses journey information and behaviour modelling to inform business and investment decisions, reflecting cross-product, cross-channel and possibly in the future cross-departmental costs. Without a cost to serve measure, decisions can be taken for 'efficiency' in one area or channel which actually increase costs for customers or trigger costs elsewhere. This work identifies the burden for customers around tangible and time costs (and in the future will expand into reflecting the emotional costs arising from the stress of interactions). It shows how this burden maps to drivers of cost for HMRC from internal processes and it helps identify how costs multiply for both customers and HMRC during interactions to resolve issues. It also enables HMRC to interpret barriers to interactions and develop plans to influence customer behaviours and attitudes to risk, making it easier for customers to comply with their obligations or receive their entitlements.

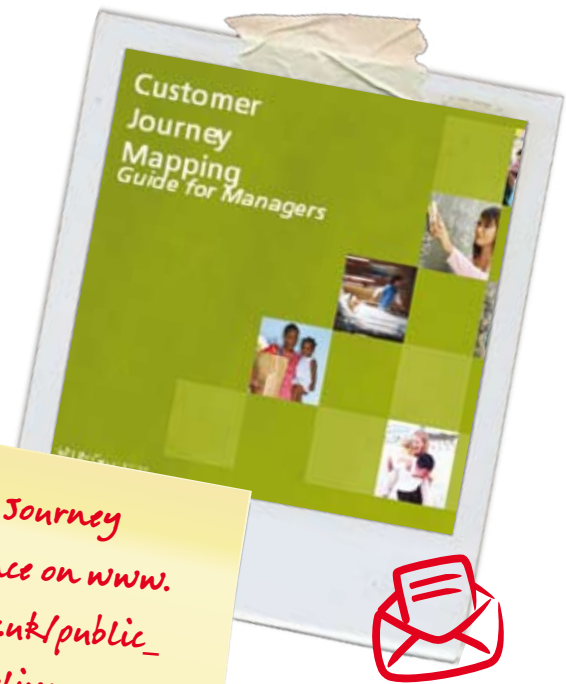
2. CASE STUDY - Rotherham Council - "I'm a Customer Get Me Out of Here...!" Home Truths Videos and Handwritten Diaries

Rotherham has developed innovative methods for mapping customer journeys through the eyes of the customer including Home Truths videos and handwritten diaries. "I'm a customer get me out of here..." is Rotherham's most innovative and effective method of seeing services from start to finish and has allowed some of their most vulnerable customers to tell them how they really feel.

- Following a Home Truths video diary of adaptations being fitted in the home, customers told the council that they felt the waiting time for an adaptation was too long. Rotherham carried out a full review of the service which led to contracts with new suppliers, the introduction of Occupational Therapy assessments for grab rails over the telephone and a reduction in waiting times from 16 weeks to 3 weeks.

- Through the RotherCare Service Home Truths Handwritten Diary, people recorded their experiences of the RotherCare community alarm scheme. Customers said that they would like a specific appointment time for the installation of equipment and, in response, Rotherham introduced an appointments diary and a dedicated installations assistant.

ROTHERHAM
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See the Customer Journey
Mapping Guidance on www.cabinetoffice.gov.uk/public-service-reform/delivery-council/workplan.aspx



3. CASE STUDY – DWP – THE TRANSITION FROM BENEFITS TO PENSION FOR PEOPLE APPROACHING RETIREMENT

- 200,000 citizens a year switch from claiming working age benefits from Jobcentre Plus or the Disability and Carers Service to receiving a pension from the Pension Service.
- Customers who fall within the remit of more than one DWP business have to manage their transactions with each agency independently, often giving the same information more than once.
- DWP used innovative customer journey mapping techniques to identify how customers are treated at each contact and to capture their feelings as they interact with different agencies.
- The work involved collaboration across multiple functions - strategy, change programmes, communications, front line businesses, policy, and customer insight.
- The approach drew on multiple data sources and included engagement with customers, staff and stakeholders.
- To develop accurate customer journey maps, interviews were undertaken with a random sample of customers who had recently gone through the transition process.
- Workshops were also held with operational staff from Jobcentre Plus, the Disability and Carers Service and the Pension Service to produce process maps identifying problem areas and hotspots.
- The interviews and workshops highlighted a process which is “one size fits all” and which risks confusion, complication and missed payments.
- A high level journey map of what future transitions from Jobcentre Plus or the Disability and Carers Service to the Pension Service could look like has now been developed and proposed improvements for the transitions process include:
 1. Better orientation for approximately 864,000 Carer customers, including the revision of Pension Credit reminder letters.
 2. A reduction in the risk of late payment of Pension Credit to customers.
 3. A revised system of access protocols to reduce the risk of payment failure.
 4. The removal of the need for customers to repeat information.



- The new process design has been validated by the customers and staff who took part in the original workshops.
- The findings show that there are significant opportunities to improve services to customers and reduce the duplication and costs of current DWP processes.
- This will be achieved by working across teams and businesses to deliver improved, coordinated services and communications, focusing on the customer and addressing their needs irrespective of where they enter the department or the benefit they are claiming.

By not recording claim information that is already known processing time could be reduced by 26%

*"This is your change not mine. I'm just a day older!"
[DWP Customer]*

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4. CASE STUDY - Colchester Borough Council's Planning, Protection and Licensing Service

Colchester undertook a review of its Planning, Protection and Licensing Service focusing on interactions with the customer and using a journey mapping approach to service planning. The review also used the Institute for Customer Service's "Touchstone" approach to gauge customers' feelings towards staff based on four core values: honesty, attitude, knowledge and commitment. The results from the Touchstone pilot identified clearly the points in Colchester's current service provision where customer satisfaction fell, so as a result they have:

1. Produced clear customer journey maps for all key processes – identifying step by step guides to complicated regulatory processes such as planning and licensing.
2. Identified ways of streamlining all correspondence to link to each step in the process and incorporating the use of images to help with understanding.
3. Identified new ways to support customers at critical stages in the process.



www.instituteofcustomerservice.com/ICS%20Touchstone.aspx



COLCHESTER BOROUGH COUNCIL

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2.

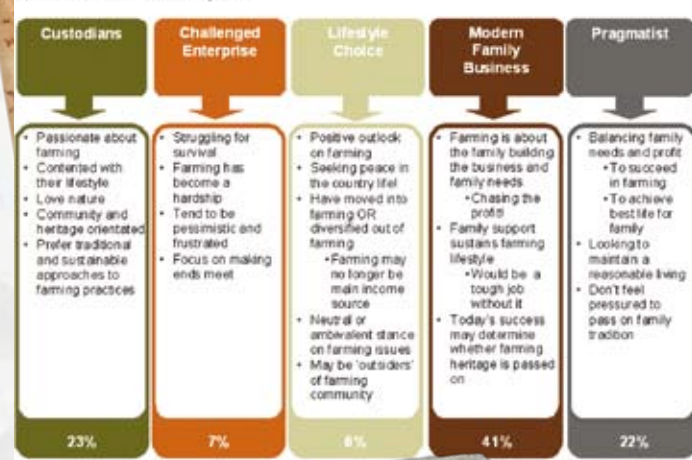
SEGMENTATION

Segmentation enables the targeting of information and services at different groups of people with different needs so that these can be fitted to an individual's requirements. It facilitates the targeting of limited resources more effectively and efficiently.

1. Case Study - Defra Farmer Segmentation

- Defra has developed a segmentation of farmers by attitude rather than by socio demographics to provide insight into their communication preferences.
- Reading University was originally commissioned to carry out research on behalf of the department in 2005–06 to identify an up to date and practical segmentation model for the process of issuing single farm payments.
- Defra built on this research to create a generic model that has wider application and reflects the changing farming community.
- They commissioned further research including an initial phase of quantitative research where a representative sample of the farming community was interviewed, followed by a qualitative phase to validate the model and provide depth.
- The research resulted in the creation of five attitudinal segments where attitudes and objectives of farmers were distinctly different between groups.
- Traditionally Defra had communicated with farmers only according to farm type and the generally held view was that this would mirror, to a degree, the attitude of farmers.
- One of the key findings of the research was that the attitudinal segments do not correlate to farm demographics (size, farm type and location).
- Defra is now using the segmentation research in the design of their communications approach and also in the development of policy.

An overview of the 5 attitudinal segments



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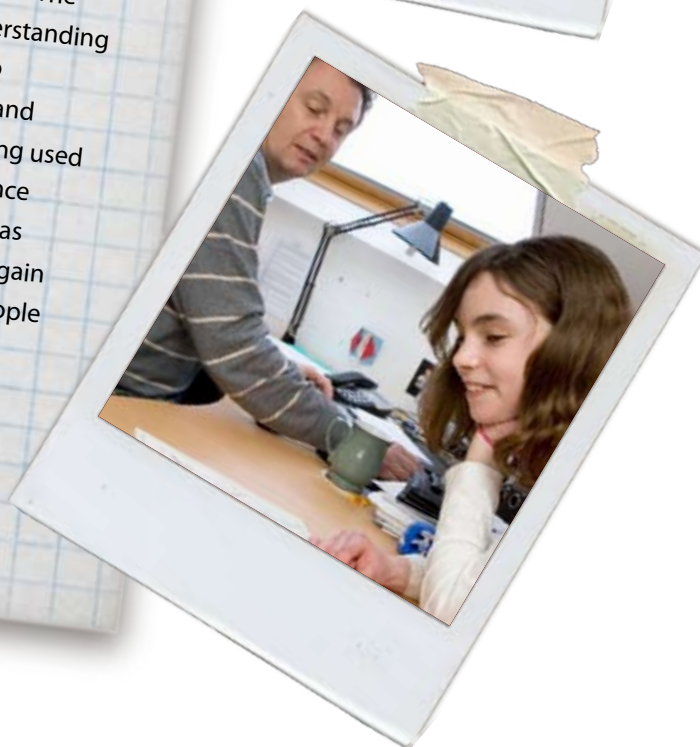
2. Case Study – DCSF segmentation of parents and children

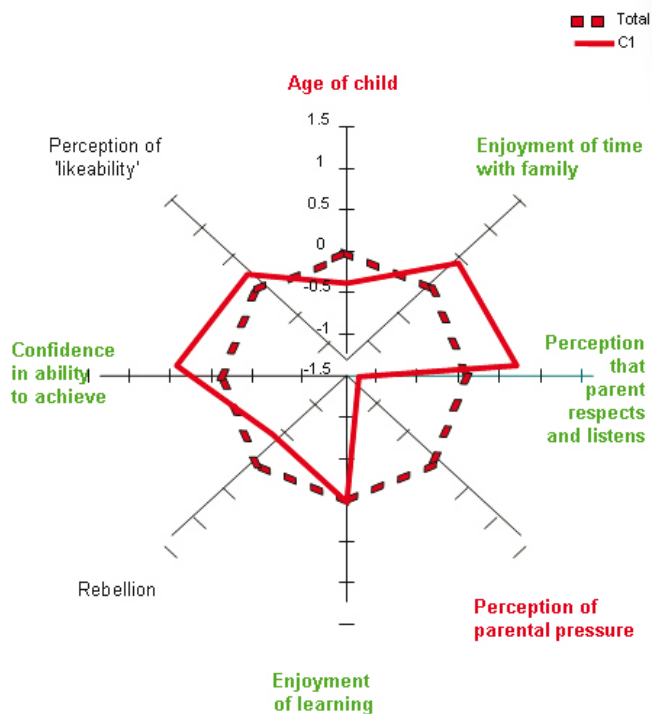
A large scale quantitative segmentation of parents and children was carried out recently by DCSF to gain a greater insight into parenting and the complex relationships between parents and their children. The segmentation was done on attitude rather than demography with a view to improving policy design and targeting messages. The segmentation stands out because it is nationally representative and uses a random probability sample. The methodology takes a new approach based on understanding underlying attitudes and motivations and has led to the identification of segments which are quite new and previously not well defined. The segmentation is being used to help address particular policy objectives, for instance the Government's Youth Alcohol Action Plan, which has combined the segmentation with qualitative work to gain insight into the attitudes and behaviours of young people and parents in relation to alcohol consumption.

**DEPARTMENT FOR CHILDREN, SCHOOLS
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C1: Growing and learning: 15% of total sample

They enjoy spending time with their families as much as they do with their friends. They have a close relationship with their parents who they respect and talk to regularly about their interests including homework.

They don't tend to feel that their parents are very strict or controlling, but rather that they offer them support and praise without putting them under pressure.

Confident and optimistic, they enjoy learning, including activities such as sport and music, but are not necessarily focussed on academic achievement as yet.

"My mum's funny, and she has got a great sense of humour, really girly, she loves to hang out. Sometimes she can be like a kid. I really like my mum."

"We're always having a laugh"

"My parents let me be free - they're not tight on me."

"I like making friends, a lot. At my school I literally know everyone and I get on with loads of people."

"I like to learn. It's a big thing learning something new. It makes you think about it."

3. CASE STUDY - NHS Great Yarmouth and Waveney - Mobile Food Store

Great Yarmouth and Waveney used geodemographic information to determine the best route for a mobile fruit and vegetable store. Maps were created to show where those who were most at risk of a heart attack or a stroke and/or those registered with diabetes lived. Additional maps were made using Mosaic population types to show where those most likely to eat less than one piece of fruit and veg per day lived and worked. The PCT decided to take the food to the streets where people live, focusing on areas with the Mosaic types most likely to eat less than one piece of fruit and veg a day. It's the PCT's business to change behaviour and improve health rather than sell fruit and veg. So they worked with a private provider and a community organisation to develop the service, which is delivered by health trainers who sign post to other services. In addition to fruit and veg, the service also provides recipe sheets, cooking sessions, taster sessions and links to other services like stop smoking, weight management, community nutrition and food co-ops.



NHS GREAT YARMOUTH
AND WAVENEY

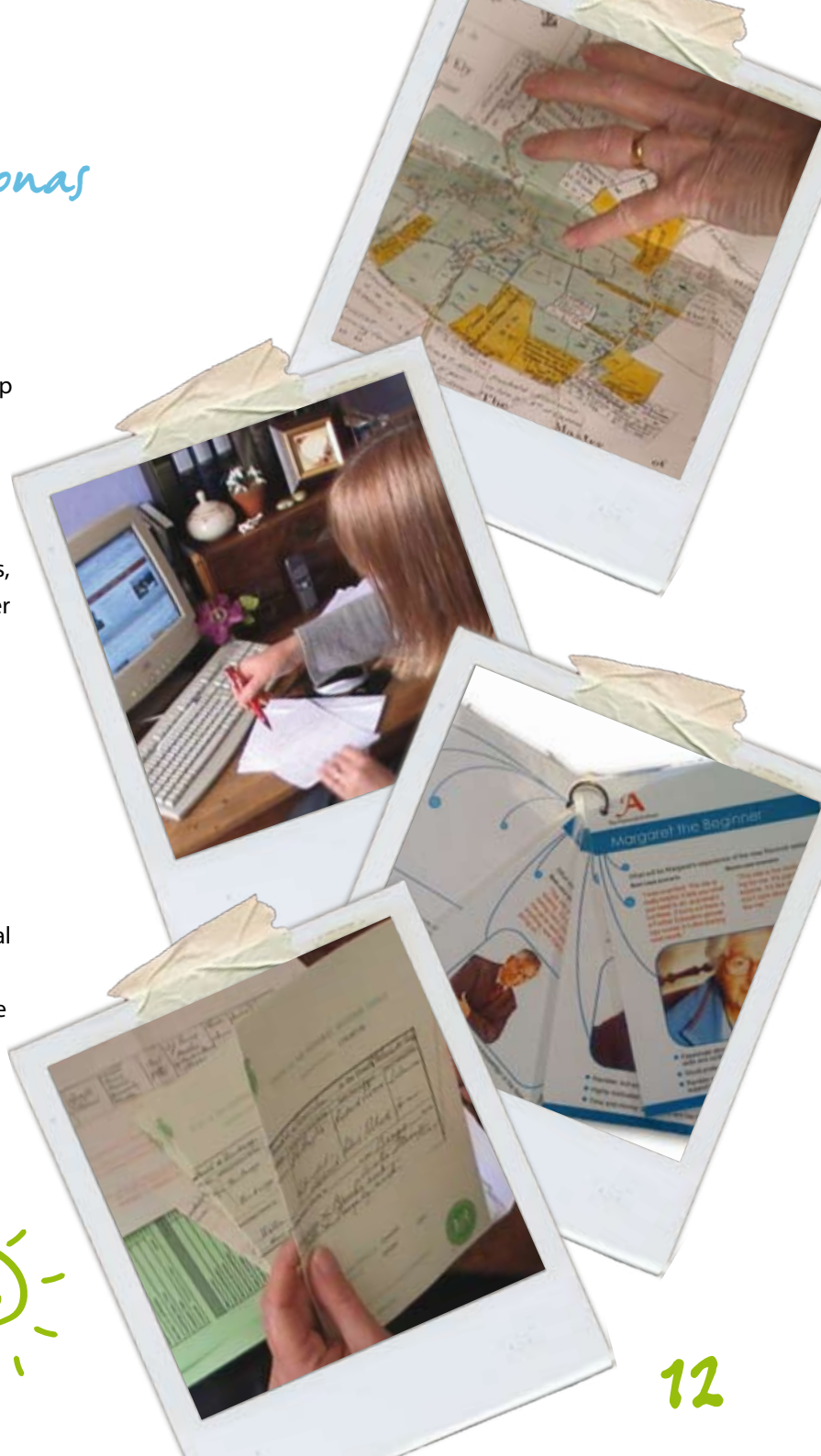
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4. Case Study - National Archives - Personas

The National Archives has segmented its audience along behavioural lines and has come up with a set of personas that it can use in the development of products, services and communications. This has proved incredibly useful in helping them to redevelop services and to see gaps in provision. TNA wanted to develop a family of websites tailored to meet the needs of specific audience groups. To do that they needed to develop a full understanding of their current online customers, including their motivations, attitudes, goals, behaviours and the constraints under which they operate. A mix of research methods was used, including stakeholder interviews and an internal audit of previous user research, a two week ethnographic field study, a four week online diary study and contextual in-depth interviews in the home. Memorable labels for people's behavioural patterns (the rambler, the explorer, the tracker) were developed along with a set of distinctive personas bringing their customers alive in a personal and visual way. The research is currently being used in a range of projects, including the development of new advice and guidance products.

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3.

CO DESIGN AND USER ENGAGEMENT

1. CASE STUDY - LUTON AND DUNSTABLE NHS TRUST - PATIENT AND STAFF CO-DESIGN

Luton and Dunstable NHS Trust used Patient & Staff Co-Design (PSCD) to involve patients more closely in the way they are treated and cared for. This recognises the fact that if patients and staff design a service together then experience is bound to improve. Head and neck cancer services used in-depth interviews with patients, carers and staff about their experiences of receiving and delivering care and identified "touchpoints" or "moments of truth" which had shaped their experiences. The patients made films which they found to be an incredibly powerful way to share their stories. When the care team saw the films, they felt a new empathy towards the deeper needs of patients and felt strongly compelled to improve things. Forty three different improvements to the efficiency, safety and overall patient experience of the services were identified and subsequently implemented.



LUTON AND DUNSTABLE
NHS TRUST

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2. CASE STUDY - DEPARTMENT OF HEALTH HEALTHTALKONLINE WEBSITE

Healthtalkonline offers completely free 24-hour a day access to patient experiences for anyone whose life is touched by illness or health issues. The information on www.healthtalkonline.org is based on qualitative research into patient experiences. The site lets you share in other people's experiences of health and illness by watching or listening to videos of interviews and reading about people's experiences. Reliable information about conditions, treatment choices and support, as well as information to help clinicians remain patient-centred as they progress through training is also available on the website. These personal stories of health and illness enable patients, families and healthcare professionals to benefit from the experiences and knowledge of others. Hits on the website now average 1 million a month.

WEBSITE

WWW.HEALTHTALKONLINE.ORG



The percentage of internet users looking for healthcare information online rose to 68% from 37% between 2005 and 2007
[Dutton & Heisler 2007]

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4. MYSTERY SHOPPING

1. CASE STUDY – ROTHERHAM COUNCIL CUSTOMER INSPECTION SERVICE

Rotherham's Customer Inspection Service uses 25 real customers who have been trained in inspection and mystery shopping techniques. The customers test how the council is performing against its service standards by carrying out a range of mystery shopping and reality checking activities. For example:


- Customers checked access points and found that there was not appropriate signage showing the entrance, occupiers and services. Rotherham has since introduced entrance, direction and reception signage, developed "Who's Who" photograph information boards and produced a "Who's Who and A to Z of Services" booklet.
- Customers carried out a telephone mystery shopping exercise across residential homes, requesting an information pack and found that the information packs were varied in content. The council has subsequently reviewed its information packs with customers and improved the quality and content.

- Customers carried out "door knocking surveys" regarding the quality of Home Care and Meals on Wheels services. They learnt that carers occasionally miss calls. The council has now developed a new monitoring procedure with providers to reduce missed calls. They also found that customers did not want to receive a hot meal at dinner time but would prefer one at lunch time. Rotherham has responded to customer requests by providing a choice of options regarding the time of delivery for hot meals.
- Customers carried out customer to customer phone surveys regarding the Noise Nuisance service and found out that people thought the council could do more work over the weekend. This led to Rotherham introducing an out of hours service where officers tour the district on Friday and Saturday nights.

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2. CASE STUDY - HACKNEY HOMES - RESIDENT INSPECTORS




In May 2006, a record 3.3 billion text messages were sent in the UK. This equates to 106 million messages sent every day [ONS Social Trends 2007]

Around 45% of online access to government websites occurs outside normal office hours [NAO (2007)]

As part of Hackney Homes' commitment to involving residents in decision-making about services, they have established a group of resident inspectors, comprising around 20 volunteer tenants and residents. Their role is to examine an area of Hackney Homes' service and find out what works well and what could be done better. From a mixture of their own experience and from interviewing other residents, the inspectors provide feedback. Initial focus has been on estate inspections, including grounds maintenance and communal areas. Working collaboratively with Hackney Homes' staff, the inspectors help to identify any improvements. Inspectors receive a modest reward (vouchers) for their time and effort.

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5. REACHING CUSTOMER GROUPS

1. CASE STUDY- CHESHIRE AND WIRRAL PARTNERSHIP NHS FOUNDATION TRUST - PATIENT STORIES

Cheshire and Wirral have established a consultation network led by their communications officer and speech and language therapy assistants. The main aim of the network is to develop meaningful ways of consulting with clients who have a learning disability in order to gather feedback about their experiences of using and receiving services. This feedback is collected using methods which acknowledge the communication difficulties that people with learning disabilities have. To ensure that these patient stories are accurate and that staff are not distracted by transcribing the comments during the discussion, where consent is gained, tape recorders are used. In circumstances where the client is not able to give consent, the carer or advocate would give their permission for the client's 'story' to be heard.

The consultation group plans to pull together the themes and comments from patient stories and collate them into a general report three times a year which will go to the relevant groups/forums within the trust's governance structure to ensure that this crucial feedback is fed back into service development.

Almost 40% of people
in the UK value time
as the most valuable
resource in everyday
life
[IIPS (2007) Time
Squeeze Generation]

CHESHIRE AND WIRRAL
PARTNERSHIP
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2. CASE STUDY - EDUCATION LEEDS - PERSISTENT ABSENCE RESEARCH

Education Leeds is a non profit company owned by Leeds City Council. Leeds is in the bottom quartile of local authorities in terms of persistent absence from secondary schools and like many other organisations it has struggled to gain meaningful insight into hard to reach groups on specific issues which affect their lives.

To find out more about the issues for children and young people and their parents/carers regarding persistent absence and what could be effective in reducing this absence, Education Leeds consulted a wide range of professionals through interviews and questionnaires and listened to children, young people, parents and carers through focus groups and semi-structured interviews. Interviews were also undertaken with key partner agencies in order to help identify their potential contribution towards reducing persistent absence and with a view to developing a more multi-agency approach to tackling this issue. Visits to other local authorities were undertaken in order to identify good practice.

A key finding from the research was that both parents/carers and young people did not see the relevance of learning and achieving. As a result, Education Leeds is now looking at different ways of ensuring that learning is relevant and engaging for students who may not currently respond well to existing teaching methods. The research also highlighted the need for additional input for young carers, including extra support and practical measures such as allowing access to a phone while at school. This research has raised the profile of persistent absence and its relationship to other complex issues affecting children and their families with other Childrens' Services colleagues, leading to a better multi agency approach where persistent absence is seen as a symptom of other problems.



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Life expectancy in the UK is rising at a rate of around two years each decade [ONS Centre of Demography (2007)]

3. CASE STUDY –

HOME OFFICE

MOTIVATION FOR KNIFE

CARRYING RESEARCH

This large scale innovative qualitative project involved gallery and in-depth interviews with about 90 kids aged between 10-16 who had either seriously considered carrying knives or who had carried them in the past. The gallery style meant that friendship pairs were taken round an exhibition of around 10 large paintings, collages and interactive exhibits designed to stimulate conversation around particular areas such as authority, family, responsibility, risk, and aspirations. By understanding the wider context of these young peoples' lives, the Home Office was then able to get a deeper understanding of why and where knives fit in and which factors influence the carrying of knives.

The three key insights from the work were:

- Young people make a trade off between the risks and consequences of carrying a knife. Often the decisions behind this trade off are uninformed.
- Peer Influencers: any message received will be endorsed or countered by peers. Messages are stronger when delivered/reinforced by peers.
- Matriarchal figures are a key influencer providing safety, support and alternative routes. However it's important not to put this protective and personal role of "mother" at risk.

The results of this research are being used to inform Government's strategy on knives.

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Thank you

This booklet has been made possible by the initiatives, time and thoughts of all contributors, including those whose submissions we could not include for reasons of space. We thank you all.

We will continue to collect best practice examples of the tools, techniques and approaches that you are using to understand and respond to the needs and behaviours of the people you serve. We welcome your comments and feedback on this new publication.
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This booklet can be found in Publications on:

http://www.cabinetoffice.gov.uk/public_service_reform/delivery_council/workplan.aspx

