



# Customer Experience Toolkit for Place Leaders

Excellence in Place Leadership Programme



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## Foreword

In July 2020 the Excellence in Place Leadership (EiPL) cohort focused on the subject of Customer Centric Place Services. We posed the following questions:

- *The users of local authority place services do not expect to receive a customer experience comparable to the very best in the public and private service sectors. Is this a fair statement?*
- *What can Place Leaders do to emulate the very best in customer centric engagement, service design and delivery?*

The public is used to an increasingly high private sector customer experience benchmark. Firms such as Amazon, Ocado or ASOS are constantly innovating to improve their services, to stay ahead and be competitive. The public has come to expect outstanding service, increasingly personalised to reflect their wants and needs, and a mutual understanding that poor service and poor value for money will not be tolerated. Given this environment, understanding customer need is increasingly vital if we are to move towards outcome and evidence based commissioning of services. Customer insight should be fundamental to helping local authority place leaders understand the needs of their customers and so deliver better outcomes.

Recent research by the Local Government Association showed that while 56% said they were fairly satisfied and 19% were very satisfied with the services they received, only 11% said these services provided value for money and just 9% thought their council responded strongly to their needs.

This toolkit has been produced to provide a practical guide to enable Place Leaders to plan their response to this challenge.

Based on research, it takes the building blocks of customer centricity and provides information, practical tools and case studies to enable Place Leaders to plan and develop key interventions.

Place Leaders will be at different starting points and have differing challenges. This toolkit has been designed to enable users to dip into areas of particular interest or challenge.

The toolkit ends with some prompts for leaders to reflect upon when planning an approach and identifying personal challenges to provide leadership vision, sponsorship, direction and role modelling to this critical challenge.

## Introductory letter

Paula Hewitt, Lead Director for Economic and Community Infrastructure & Director of Commissioning, Somerset County Council.

It gives me great pleasure to bring this customer experience toolkit to you. I feel huge pride that we have been able to focus on this critical subject during the disruption and pressure of the pandemic response.

Our EiPL cohort spent a day in July 2020 discussing the challenges of creating an excellent customer experience in local government. Despite the fact that we all attended this remotely, the passion and curiosity for the subject was abundantly evident, as was our commitment to pursue our work.

Whilst we were all very conscious of the pressures and ever present conflicting priorities we face, we brought an open and solution focused mindset to the day. The cohort were very cognisant of the resource constraints that all authorities face and the need to balance easily accessible and customer focussed services with the need to also manage demand and allocate scarce resources fairly. We all recognised that being open and honest with our customers about what we could and could not do was important.

In creating a customer centric organisation we cannot focus our efforts on a single element, such as a great digital experience or a compelling brand promise. These things of course are essential but as we have seen, to be truly focused on the customer we need to bring a series of building blocks together:

- *How we work together in collaboration across different functions and agencies to take a whole look at the customer experience*
- *Clarity around what we stand for and how we communicate this across our communities*
- *The use of data and information to gain insights and measure satisfaction*
- *Engaging and empowering our employees to think about customer needs and provide a great service*
- *Our role as leaders in shaping our cultures to focus on the customer experience*

As this toolkit makes clear, we may all be at different stages in our work and face our own sometimes unique challenges.

Our starting points will vary, and different things may be a priority to us. In addition, it would be unrealistic to tackle every aspect of the customer experience at the same time. Sometimes initiating small changes can make a significant difference to our customers, but also to our employees.

So in conclusion, use this toolkit to think about your pain points, your opportunities to improve, and your priorities. Get your teams engaged in identifying steps to bring sustained change and reach out to each other to share ideas and best practices.

# The building blocks of a customer centric organisation

**COLLABORATION  
AND INTEGRATED  
SERVICES**

*"How do we make sure we are joined up across our organisation and with others with a common focus on customer satisfaction?"*

**CULTURE CHANGE**

*"To be a truly customer centric organisation, over time we will need to align our whole culture around the customer. We can take incremental steps towards this challenge."*



**BRANDING AND  
SHARED VALUES**

*"To create a great experience we need to really know our customers. In turn, we need to let them know what they can expect from us. They need to know our brand promise."*

**EMPLOYEE  
EMPOWERMENT**

*"Our front line employees are the face of our organisation. They need to be motivated to provide the best experience to our customers."*

**DATA-DRIVEN  
TRANSFORMATION**

*"How should we use information about our customers their wants, their needs and their satisfaction levels to design and improve our services."*

## Developing a Customer Experience Roadmap

The toolkit can help Place Leaders plan an approach to improved customer experience.

The majority of organisations focus on a tiered approach that involves short-term efforts fixing known and frequently occurring pain points and setting future direction, addressing inconsistencies in performance through constant monitoring, and moving forward to provide excellence in customer service.

Typically a programme such as this will run over 3-5 years. The diagram below shows a linear approach. Depending on your starting point, you may step into your programme at different points and prioritise different initiatives.

### FIX THE BASICS

- *Collect data on current performance (Voice of the Customer)*
- *Identify new information or data needed*
- *Prioritise pain points that need to be addressed*
- *Review short-term digital developments*
- *Engage employees in focus groups and working groups*
- *Collect data on employee engagement (Voice of the Employee)*

### DELIVER CONSISTENTLY

- *Constantly monitor performance using customer data; focus on consistency of key processes*
- *Focus on digital and physical performance*
- *Review communication methods and styles*
- *Invest in customer excellence training*
- *Monitor employee engagement*

### CUSTOMER EXCELLENCE

- *Enhanced and increased efforts to engage and consult with customers on current and future services co-creation*
- *Personalised and tailored communications and services*
- *Enhanced digital capabilities*
- *Empowerment schemes*
- *Develop employees behavioural skills*









# Collaboration and Integrated services

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## Collaboration and Integrated Services

### WHY WE NEED TO FOCUS ON THIS

- *Customer centric organisations put the customer at the heart of their decision making. This means the customer experience is not owned or shaped by a single part of the organisation, but by the whole organisation, and by any other agencies, third parties or partners who play a role.*
- *Overcome traditional organisational silos and work in a collaborative way to address problems and develop innovations. It means sharing data and feedback about problems in an open and transparent way, focusing on the best outcomes for customers rather than individual departments or agencies. This involves being open to the ideas of all.*

### WHAT IT MEANS IN PRACTICE

- *Actively seeking out opportunities to bring teams from different places to work together on the customer experience.*
- *Establishing working groups involving different functional areas to address problems.*
- *Customer journey mapping involving cross functional and cross agency groups becomes an established organisational discipline.*
- *Sharing and publishing of customer data and feedback across the organisation and across partner organisations – essential to develop a mentality of problem solving rather than blame.*
- *Ensuring technologies are never developed without involvement of users.*
- *Leaders publicly stating their expectation that we will work together across all areas to provide joined up services with customer at the heart.*

## Customer Journey Mapping: Getting Started

### Customer Journey mapping is the best way to understand and design better end-to-end customer experiences

- The aim of customer journey mapping is to improve the customer experience by better understanding it – from the customer perspective.
- Customer journey mapping is a discipline which involves bringing together people involved in different parts of a specific customer experience.
- By customer journey we mean the steps and actions taken by a customer to complete a specific transaction, for example submitting a planning application.
- The journey can be digital, physical, or a combination of both, and can involve single or multiple agencies/organisations.
- It involves mapping and then analysing the “as is” – what the customer does currently.
- Based on this analysis, designing how the customer journey could be better designed for the future.

*“Organisations able to skilfully manage the entire customer experience reap enormous rewards: enhanced customer satisfaction, increased revenue and greater employee satisfaction. They also discover more effective ways to collaborate across functions and levels, a process that delivers gains throughout the organisation.”*

**Harvard Business review**

### JOURNEY MAPS HIGHLIGHT:

- Unnecessary complexity
- Gaps in the information we provide, how we provide it, and how easy it is to find
- Scope for error
- Places where particular customers may struggle (for example with IT, or language)
- Unclear ownership
- Speed and transparency issues
- Efficiency opportunities
- Opportunities to delight customers



## Customer Journey Mapping: Getting Started

### BEFORE THE MAPPING EXERCISE

- ✓ *Decide which customer journey to focus on. It can be tempting to choose the most complex and painful, but it's better to start with something more straightforward as a first attempt.*
- ✓ *Invite the right people – this means people who really understand the customer journey and preferably the customers' pain! Attendees are likely to be people who operate processes and interact with customers, and not senior managers. It may be appropriate to invite customers.*
- ✓ *A group of around ten people can work well for a mapping exercise.*
- ✓ *Appoint a facilitator to focus on managing the process (and not the content).*
- ✓ *Gather whatever data you have about the customer journey. This could include information on failures or multiple contacts at different points, average time taken for different steps, and an analysis of complaints. This information is key to ensure the customer reality is brought to the table.*
- ✓ *Whilst face-to-face meetings are great for customer journey mapping, technologies such as Padlet enable mapping workshops to work well on-line.*



## Customer Journey Mapping: Mapping the “As Is” and Creating the “To Be”

### RUNNING THE “AS IS” EXERCISE

- *It's good to start a mapping session by reviewing all the data you have collected. This will focus the mind on the task at hand.*
- *It may be appropriate to invite a customer to talk about a recent experience.*
- *The facilitator should lead the mapping exercise ensuring that steps are captured and a series of questions are posed for each step. These include:*
  - *The customer goal*
  - *Actions*
  - *Channels*
  - *Pain points*
  - *Emotions*
  - *Opportunities*
- *The journey is unlikely to be entirely linear and the journey map created during your session may look chaotic.*
- *There are various ways output can be collected and a sample template is included in this toolkit.*
- *As an overarching point, it is essential that the map focuses on customer EMOTION as well as actions. The customer perception of the way they have been treated will far outweigh the effort they have to make.*

### RUNNING THE “TO BE” EXERCISE

- *This exercise can be run at the same time as the “As is” but there is merit in running it as a separate exercise.*
- *This gives the opportunity socialise and validate the “as is” and to involve new people if necessary.*
- *The facilitator will need to pose a series of questions:*
  - *Is this step necessary at all?*
  - *Is there a more efficient way to meet the customer goal?*
  - *Could this be managed digitally?*
  - *Could it be moved upstream?*
  - *How could we delight the customer?*
  - *How can we remove negative emotion such as frustration?*
- *“To be” maps always need to pose the question “how ready for change is the customer? Will they embrace or adapt to this?”*
- *The “To Be” map does not have to be a perfectly polished document. It is likely the “To Be” map will pose a series of questions to be socialised around different groups in your organisation. For example:*
  - *What would it take in terms of resource to introduce a new technology?*
  - *Which stakeholders would we need to influence about this new journey?*
  - *What is a realistic timeframe?*
  - *Are there early wins we should just implement?*

## An example Customer Journey mapping template

Stages	Step 1	Step 2	Step 3	Step 4	Step 5
Customer goals					
Customer action					
Channel/touch point					
Pain points					
Customer emotions					
Opportunities to improve					



## Customer Journey mapping template

### Example – customer obtaining a council tax discount for family member with a severe mental impairment (1 of 2)

Stages	Step 1	Step 2		Step 3
Customer goals	Customer may have a general goal to ensure they or their family member gets the financial support they are entitled to, but be unaware council tax discounts are available	To gain more information about what is available and how to claim it		To make an application
Customer action		Customer researches 		Customer receives application form
Channel/ touch point		Internet search	Phone call to council	Usually available on-line
Pain points		Those with no internet access may phone the council or other agency	Recent research suggests two thirds of councils gave incorrect information by phone	This may need to be posted to those without digital access
Customer emotions		Possibly very different depending on whether customer is IT literate and English speaker	Could be some frustration, anger, anxiety	Could be some frustration, anger, anxiety
Opportunity	How can the public be made more proactively aware of their entitlements?	How do we make digital process as easy and clear as possible?	Training for call handlers	Can we proactively offer support on the completion of the forms?



## Customer Journey mapping template

### Example – customer obtaining a council tax discount for family member with a severe mental impairment (2 of 2)

Stages	Step 4	Step 5	Step 6	Step 7
Customer goals	To understand whether family member is eligible	To understand whether family member is eligible as they need confirmation of diagnosis	To understand whether family member is eligible as they need confirmation of diagnosis	To discover eligibility
Customer action	Customer must know what benefits their family member is eligible to receive	Customer needs to contact GP surgery	Customer needs to contact GP surgery	Council contacts customer
Channel/ touch point	The form will specify this requirement	Customer may email	Customer may email	Letter to customer
Pain points	Customer may not know the difference between eligibility and receipt of benefit	Without access to email the customer may need to call or visit the GP surgery	Without access to email the customer may need to call or visit the GP surgery	Customer may believe they are due a rebate
Customer emotions	Customer may feel confused and frustrated	Customer may feel they are joining up information from different agencies	Customer may feel they are joining up information from different agencies	Relief or disappointment depending on the outcome
Opportunity	Is there opportunity to help the customer with this, particularly where customer receives benefits already	Is there a way to provide joined up information with the NHS where the customer already has a diagnosis?	Is there a way to provide joined up information with the NHS where the customer already has a diagnosis?	Can the confirmation letter provide proactive information about appealing or gaining a rebate?

- *This journey map would help identify why customers in receipt of this discount vary so widely across different councils.*
- *Backed up with data, it would help identify at what point of the customer journey there is the capacity to improve access to information .*
- *For example: including information with council tax bills or liaising with other agencies, training employees, joining up data from different agencies, providing updates on applications, and making provision for those lacking access to technology.*

## Customer Journey mapping in action



Derbyshire County Council uses Customer Journey mapping to improve services and ensure they are meeting customer needs. They have mapped services including social care and staff recruitment, which has identified improvement actions.



BA uses customer journey mapping to prepare customers for forthcoming trips, to make the process through the airport as efficient and stress free as possible. Journey mapping has enabled BA to better personalise communications for their customers – for example recognising those with children. It has also highlighted opportunities to recognise Executive Club members and to thank them for their loyalty.

All housebuilders undertake journey mapping to understand the customer experience of what is an extremely significant purchase and often major life milestone. This involves understanding the emotional journey that customers experience and how employees can make each step as stress free and positive as possible. The considerable decision points are identified during the mapping and constantly reviewed to ensure employees can support customers through these.









# Branding and Shared Values

*"A brand is a promise.  
A good brand is a promise kept"*

Muhtar Kent (former President of the  
Coca-Cola company)

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## Branding and Shared Values

### WHY WE NEED TO FOCUS ON THIS

- *As customer expectations of service generally increase, understanding and managing your customers' perceptions of your authority becomes ever more important.*
- *Branding is a way of doing this. It is a way of explaining what they can expect from you.*
- *This involves creating and articulating shared values – “what we stand for”. Of course, this will be different for a local authority than, for example, a retailer or technology company, but the process of aligning around values is highly relevant.*
- *These values should underpin the customer experience, and how we communicate with our customers.*

### WHAT IT MEANS IN PRACTICE

- *You may or may not already have developed shared brand values.*
- *If your brand values already exist, the challenge is to ask to what extent they are well understood and communicated within your organisation, and across your customers and community.*
- *You should also assess how well your brand values underpin and are evident in the services you offer, and the way your employees provide that service.*
- *When undertaking customer journey mapping you should ask how well the values are brought to life.*

## Developing a brand and values and bringing them to life...

### LEADERSHIP ALIGNMENT

- Agree the need and agree objectives
- Scope the exercise
- Get alignment to the method

### CONSULTATION: EXTERNALLY AND INTERNALLY

- Consultation can be done using a variety of methods
- The question to be asked is what should we stand for and be known for? What matters to you?

### IDENTIFY COMMON THEMES

- What are the common words and themes that arise? What do employees and customers share? What resonates with us?

### DRAFT VALUES

- A statement can now be developed. Make sure this is in draft so people can further comment.

### ROAD TEST: EXTERNALLY AND INTERNALLY

- Take the draft statement to further consultation externally and internally
- Explain how it will be used

### LAUNCH AND IMPLEMENT

- Now the real work starts! The values must be lived and breathed across the organisation.
- They must underpin the fabric of your service and the way you work

## SOME BEST PRACTICES TO LAUNCH AND IMPLEMENT VALUES

- When launching make sure that senior leaders demonstrate ownership and commitment.
- Enable comprehensive employee and customer communication.
- Values should be communicated widely through literature, web sites and social media.
- Customer journey mapping should review how values are brought to life.
- Customer Insight data should be reviewed – what does it tell us about the way we live our values?
- Teams should be measured against the extent to which they demonstrate values.

## Branding and Shared Values



*"Our community has so much in common and so much to offer to each other. We think these values will help to bring us together and guide all of our work. We want to hear from everyone who has an interest in Bradford District, whether they live here, work here, visit or have other connections."*

**Councillor Abdul Jabar,  
Bradford City Council Executive  
Member for Neighbourhoods and  
Community Safety**

In 2018, Bradford City Council published a 5 year strategy "Stronger Communities Together". The strategy recognised the need for a society based on shared values and responsibilities.

The Stronger Communities Partnership Board brings together voluntary, private and faith sectors, and local people. They have been working to define the shared values of the people of Bradford.

The council ran a series of surveys and focus groups, asking the question "What unites us and brings us together?" There were events in various places including shopping centres, colleges and the university. The words people used to describe what was important to them were recorded. Through this work a number of key words came up time and time again: caring, understanding, kindness, people, safety, community, supporting, helping, respecting.

This has enabled the development of a draft value statement which the public are currently being consulted upon using an online survey. A series of meetings with young people, local businesses and communities is also planned.

Once agreed, this value statement will underpin the way services are shaped and delivered.

### The proposed values:

#### *We Protect*

**We protect each other and the environment in which we live in.**

"We take pride and responsibility in looking after each other and the place we live in. Nobody should feel unsafe. We speak out if something is wrong and look out for each other and the place we share."

#### *We Accept*

**We accept and include everyone, celebrating each other and humanity.**

"We unite for fairness, equality and justice. We believe that our differences are our biggest strength and magic happens when we mix together."

#### *We Care*

**We care for each other and treat each other with kindness**

"We care that everyone has a voice and is understood and can be themselves. We make time and effort to talk to, listen to and look out for each other."

#### *We Encourage*

**We encourage each other to grow and thrive to be the best that we can be**

"We take every opportunity to grow, inspire new ideas, challenge things when they are not right and never giving up when things get tough."

#### *We Respect*

**We respect ourselves, each other and our world**

"We show respect and understanding for each other. It does not matter what age, sex, gender, sexuality, race, culture, religion, ability or disability someone has, we all are special and unique in our own way."

More information on Bradford's Stronger Communities Together Strategy can be found at <https://bdp.bradford.gov.uk/media/1363/stronger-communities-together-strategy.pdf> or <https://tinyurl.com/y462tqfz>



## Branding and Shared Values



Premier Inn, owned by Whitbread, is the UK's leading hotel brand. It has also been voted the UK's favourite brand and gains consistently excellent customer feedback on the experience provided.

The company's Customer Heartbeat model defines the shared brand values key to the long-term success and reputation of the organisation.

The values are lived and breathed by Premier Inn employees who are measured by how well they are able to bring the values to life.

Premier Inn show they are prepared to stand by their commitments – they invest heavily in their facilities, and promise money back if a customer does not have a great night's sleep. They advertise this widely – demonstrating confidence in their promise.











# Data-driven Transformation

Data must be turned into insight, knowledge and meaning  
to paint a rich picture of the customer experience

*"Customer Insight is not new and councils routinely  
undertake some elements through tools such as  
consultation and surveys. However, a step-change is  
needed in how customer insight is embedded within  
public organisations"*

Insight: Understanding citizens,  
customers and communities

Local Government Association

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## Data-Driven Transformation

### WHY WE NEED TO FOCUS ON THIS

- *Only by understanding what is truly important to people can a service be efficient and effective.*
- *Without data it is impossible to say with confidence how customers rate current services, to what extent they meet their wants and needs and what changes they wish to see.*
- *It's also impossible to say what customer may want and need in the future to shape the agenda.*
- *Customers may have emotional attachment to certain services but in reality have a greater need for alternative services - all this needs to be navigated.*
- *A customer data strategy can help to ensure that there is clarity around how customer data is collected, used and integrated to inform decision making.*

### WHAT IT MEANS IN PRACTICE

- *Public sector organisations are increasingly focused on customer data and insights – but to use this effectively you will need to develop a culture open to feedback and prepared to share and use information.*
- *You will also need to have the skills in your organisation to turn data to insight and knowledge.*
- *Much data already exists in every organisation. A starting point is always to consider what is available and how it is being used.*
- *This will enable you to identify the gap. What do you need to know and why? What are the decisions you need to inform and the performance you need to improve?*
- *Is someone accountable for integrating and analysing data across your organisation? Who is looking for trends and finding the customer insights behind the numbers? It can be complex, but how do we integrate the different systems we use to provide a real joined up view and gain real insights?*

## Best Practice in Customer Experience data

### SOME DATA IS ALREADY WIDELY AVAILABLE AT NO COST....

- *Organisations already have a wealth of data available. Sometimes this is used and used well, but often it is not fully utilised. To gain value and insight from the data we need to:*
  - *Ensure it is analysed*
  - *Extract key themes and customer sentiment*
  - *Integrate different data sources – for example, complaint data with social media, or most frequently accessed services with complaint data. It is this integration which will create the narrative around the customer experience*
  - *Consider producing a dashboard*
  - *Make sure the information is regularly communicated widely across the organisation*

#### EXISTING DATA SOURCES INCLUDE:

- *Front line employees*
- *Call centre employees*
- *Social media*
- *Complaints received*
- *Other unsolicited feedback*
- *Customer communication via web chat*
- *Web analytics*

## Best Practice in Customer Experience data – measuring satisfaction with transactions or services used

### TRANSACTIONAL INSIGHT DATA

- *It is a best practice to measure customer satisfaction with particular services accessed.*
- *This is usually done via a short survey – usually delivered by email or SMS.*
- *Private and public sector organisations, including the NHS routinely surveys people using services such as local surgeries.*
- *This data provides information about how satisfied customers were with their overall experience (see the next page on metrics), but also looks at different parts of the process and measures factors such as speed, transparency, the quality of communication, and the capabilities of the person dealing with their issues, particularly if something went wrong.*
- *The information is used to highlight areas in need of development.*
- *Best in class customer experience systems enable advanced analytics and therefore the ability to pinpoint very specific improvement actions. They enable satisfaction to be analysed by:*
  - *Time of day and day of week*
  - *Employee who served the customer*
  - *Text analytics where customers have left comments*
  - *By product purchased or service accessed*
- *Where customers respond to surveys, we should always “close the loop” by responding to customers, especially where they have complained.*
- *We should avoid over surveying customers.*

Data gathered in transactional surveys is useful if widely communicated and used to drive improvements. It should help leaders create a narrative about the customer experience and need for change.

Best Practice in Customer Experience data

3 KEY INDUSTRY STANDARD METRICS

NET PROMOTER



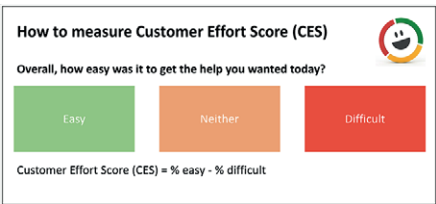
The Net Promoter Score is widely considered to be the gold standard customer experience metric and is commonly used in the private and public sectors.

It asks the question “on a scale of 0 to 10 how likely are you to recommend (organisation) to a friend or colleague?”

The score is calculated by deducting the % of detractors (scoring 0 to 6) from the % of promoters (scoring 9 and 10).

It is considered to be the best indicator of loyalty because it measures emotional investment.

CUSTOMER EFFORT



The Customer Effort Score is based on research which showed customers valued ease of effort above all else.

The CES asks the question “on a scale of very easy to very difficult, how easy was it to interact with (organisation)?”

It is a simple and easy to track metric but limited in providing insight about longer term relationships.

CUSTOMER SATISFACTION



Customer Satisfaction (CSAT) is a versatile measure enabling you to ask a variety of questions about a single interaction or touchpoint.

It is limited when it comes to measuring the longer term relationship with an organisation.

Many organisations use these three metrics together, to provide a more complete picture of the Customer Experience



## Best Practices in Customer Experience data – Insights about customer wants, needs and the things they value

### CUSTOMER INSIGHT DATA

- *Whereas transactional data looks backwards at a customer's recent experience, we may also want to have information about what customers value – their future wants and needs.*
- *This information is valuable for forward planning, making or validating decisions, and for innovation.*
- *It may also be useful to gain feedback about the extent to which changes already on the horizon may need to be positioned, and communicated.*
- *Gaining this type of insight can require a more open dialogue, or the posing of questions.*
- *Research shows that people are more likely to participate in this type of feedback when they are emotionally engaged with a brand – Place Leaders may have to think creatively about how they engage their customers.*
- *Customer insight data can help to:*
  - *Deliver tailored services that are more efficient and effective*
  - *Target resources towards priority groups or services*
  - *Enhance service and improve satisfaction*
  - *Demonstrate to customers/communities that you understand their needs*
- *Data can be collected using a variety of methods (see following pages) and a pilot can be a good place to start.*

### CUSTOMER INSIGHT: SOME EXAMPLES

Start with a clear sense of how the knowledge will be used to make decisions. Some applications in local government are listed below:

#### TO INFORM STRATEGY OR POLICY

Harrow Council's scrutiny function conducted a review into high fear of crime using a combination of local crime data, customer surveys and consultation exercises. The review's recommendations helped the council, police and others in the local strategic partnership to work together to tackle the issue.

#### TO MANAGE PERFORMANCE

Westminster City Council conducts targeted surveys of customers shortly after they have accessed council services to identify tangible ways in which each service could be improved and gauge customer satisfaction. 130 improvements have been implemented.

#### TO ALLOCATE RESOURCES

Camden Council has tailored location and services offered by customer access points to target specific customer groups and allocate resources based on a better understanding of priority need.

*Source: Insight: understanding citizens, customers and communities*

## Data-driven Transformation at Highways England



*"Using the term 'customer' allows us to connect and make relationships with actual people and understand their needs. This helps us to shape the things we do"*

Highways England has transformed itself from road builder to network operator and in doing so put the road user – their customer – at the heart of the operation. Performance against government delivery targets is formally monitored by the Office for Road and Rail with Transport Focus acting as the watchdog on behalf of customers. The target is to deliver 90% customer satisfaction - now on 89.5% - alongside other targets around project delivery and safety set within the public funded Road Investment Strategy (RIS).

The challenge has been to develop ways to actively listen and involve customers, and to understand how they feel around the regions to improve services and the network operation.

- *Tools used include:*
  - *User insights panel – an online portal of 2,000 road users providing feedback.*
  - *Social media monitoring - to identify online influencers and analyse customer sentiment.*
  - *Insight survey – an online quantitative survey with a robust sample size of 22,000.*
  - *Behavioural insight in vox pops – to understand behaviours and respond to bespoke needs.*





# Employee Empowerment

*"People will forget what you said, they will forget what you did.  
But they will never forget how you made them feel"*

Maya Angelou

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## Employee Empowerment

### WHY WE NEED TO FOCUS ON THIS

- *Many local authority employees interact with customers daily in a very wide range of circumstances.*
- *The impact of customer-facing employees on customers cannot be underestimated.*
- *There is a direct link between motivated employees and outstanding customer service. Research from Gallup tells us that the most motivated teams are those that have the opportunity to do their best work every day.*
- *Further research shows that companies that excel at customer experience have 1.5 times as many engaged employees as those who don't.*
- *Yet empowered cultures where employees are encouraged to use their insights to develop creative approaches and work together to solve problems appear to be less evident in the public sector.*

### WHAT IT MEANS IN PRACTICE

- *This is a non-negotiable area to focus on. Without motivated and empowered employees who have the will and the skill to deliver great service, it will not be possible to create consistently great customer experiences.*
- *Alongside work to focus on the customer experience, we must focus on the employee experience.*
- *This means alongside listening to the Voice of the Customer, we must listen to the Voice of the Employee – through regular dialogue and surveys.*
- *We must engage employees directly in work to improve the customer experience, for example, journey mapping, and ask them what they need to provide great service.*
- *We should never forget that our people really are our greatest asset – so how do we get the most from them?*

## Empowering and Motivating Employees – some options



## Improving the Employee Journey at John Lewis Partnership



- *In common with all retailers, John Lewis faced increasing market pressures.*
- *A great deal of work had been done to analyse the end-to-end experience for customers. JLP wanted to explore how this learning applied to the Partner (employee) experience, and to understand how one could support and enable the other. They asked Change Associates to help.*
- *Change Associates facilitated sessions to reveal the critical touchpoints of the Partner experience and explored how they link with those of customers.*
- *We identified that the two were inseparable and mapped the Partner experience against John Lewis' well-established customer journey.*
- *We analysed the critical touchpoints to understand how each could be made more positive and engaging.*
- *This included:*
  - *Setting realistic expectations at the points of attraction and onboarding*
  - *Establishing and maintaining consistent performance standards*
  - *Clarifying the behaviours expected by customers*
  - *Equipping Partners with the know-how, systems and processes they needed to do their jobs well.*



# Cultural Change

## Leadership is at the centre of culture

*"Leaders have a responsibility to demonstrate the beliefs of the company and reinforce behaviours that reflect those values. 'Be the change you want to see' serves as a powerful motto as a CEO. You can't delegate creating the culture and your employees experience. If you want to reflect particular values, demonstrate those values in your actions"*

Forbes

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Excellence in Place Leadership Programme

## Cultural Change

### WHY WE NEED TO FOCUS ON THIS

- *The toolkit has introduced the building blocks essential to creating a customer-centric organisation, and has offered some practical ways to make progress with this.*
- *Underlying much of this success is the issue of culture – a change in beliefs and behaviour. For example, it will be difficult to achieve the collaboration necessary to focus on customer journeys if the culture is rigid and hierarchical; turning data into knowledge and sharing relies on a transparent and sharing culture; employee empowerment requires trust and a commitment to develop people.*
- *Is culture change in local government harder than the public sector? Probably. The private sector gives more leeway to its leaders and has embraced shifts in structures in response to digital transformation.*

### WHAT IT MEANS IN PRACTICE

- *It may be harder to change the culture within some of the constraints of local government, but in a world that is fast moving and ever changing, flexibility and discretion are more important than ever.*
- *Changes need to come from brave leaders who are willing to challenge the way things have traditionally been done, and prepared to challenge the siloed approach to the customer experience.*
- *The following pages discuss some of the elements that come together to change cultures – but by far the most influential of these is the behaviour, actions and tone that is set by leaders and their senior teams. If these are not in place, everything else is just a stand alone initiative.*

## A Personal Leadership Checklist

Who are the key stakeholders you would need to influence and collaborate with to improve the customer experience? What may be some of the blocks to overcome? Who is already convinced and passionate about this?	
To what extent are your brand values already articulated? To what extent is this embedded in the way you design and execute services? What would you need to do as a leader to take this forward?	
How effectively is data currently used? Who is responsible for analysing customer data and communicating it? Who asks for this data? What is the priority for you and how can you initiate this?	
When was the last time you were able to stand in the shoes of the customer and the employee and see the world through their eyes? What did it tell you?	
How empowered to provide great service are your employees? How engaged in their work are they? What are the priorities for you?	
What do you consider is the biggest priority to start to change the culture? Where would you start the journey?	
What would you like your customers to say about your organisation in three years time?	

## A Roadmap for Cultural Change

### CHANGING MINDSETS AND BEHAVIOURS

1. *Get aligned as a leadership team around your commitments to the customer, and your year 1-3 goals.*
2. *Agree what behaviours you will adopt personally and tell your people. Be the change you want to see.*
3. *Set out a customer communication strategy to ensure customers and employees can see progress.*
4. *Use customer data at every opportunity to highlight challenges and successes. Introduce a dashboard and publish it.*
5. *Introduce a recognition scheme for customer success stories and make sure it is widely publicised.*
6. *Set up cross-functional and cross agency working groups to address pain points and map journeys.*
7. *Make sure your senior leaders talk directly to front line staff and customers.*
8. *Report on customer satisfaction levels along with other major financial metrics.*
9. *Introduce a new ideas scheme to reward improvements to customer experiences.*
10. *Invest in a high quality Customer First learning programme – and ensure your leadership team sponsors it.*
11. *Align your HR practices to recognise customer focused behaviour – recruitment, appraisals, learning.*

*Changing a culture is a long term commitment, and something that will take several years to achieve. It can be helpful to think about the small things that can make a difference, and what can be incremental steps*

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## Cultural Change: Case Studies



Amazon is one of the largest and most customer-centric companies in the world and does a great job of starting from the top. CEO Jeff Bezos famously leaves an empty chair at every meeting to represent the customer as the most important person. Every employee, including Bezos himself, also has to spend time working in the call centre, so they can communicate with customers and have a better understanding of their experiences. Much of what is developed by Amazon comes from feedback and desires of the customers instead of the development team simply creating whatever they want.



Business software company Intuit has always put customers first. The company encourages employees to find creative solutions and put themselves in the shoes of the customers. Intuit regularly tests its software with customers in a variety of real-world scenarios to see how people respond to the product and what can be improved. Employees put the company's values to practice by immersing themselves with customers to build strong relationships and truly understand their needs and wants.



Airbnb learned that employees didn't like some aspects of the culture of the company, feeling it did not reflect the customer ethos. Airbnb's co-Founder Joe Gebbia decided to do something about it at Airbnb's global bi-monthly meetings where employees have a chance to share their thoughts.

Gebbia introduced these three new areas for Airbnb employees to share their thoughts:

- *'Elephants' – this is the big thing in the room that nobody is talking about.*
- *'Dead fish' – the things that happened a few years ago that people can't get over.*
- *'Vomit' when employees need to get something off their chest.*

Employees feel this has led to a far more transparent culture where problems are aired and solved.





# An Outline Planning Tool

Excellence in Place Leadership Programme

## A Roadmap for Cultural Change

A simple heat map can be used to generate discussions with key stakeholders about planning priorities

	Collaboration Integrated Services	Branding and Shared Values	Data Driven Transformation	Employee Empowerment	Culture Change and Leadership
Fix the Basics					
Deliver consistently					
Customer Excellence					



A strength. We have significant work underway in this area and have made good progress



We have made some progress but have more work to do, and some key priorities



We know we have challenges and consider this a critical area of focus



## About Amey

Our team of 16,000 provides consulting and infrastructure support services. We make a difference by designing, building, maintaining and investing in our country's services and infrastructure including the UK's road and rail infrastructure, keeping schools safe and clean, managing the UK's defence estate, safely escorting prisoners and keeping prisons and courts secure. We also collect and process waste, as well as deliver key utilities services. All of this is underpinned by our leading consulting capabilities which uses engineering design and data analytics to better manage the services we all use and rely on.

Our collaborative approach means our clients trust us to deliver. We prioritise concerns and work in partnership with communities and clients – to help meet goals and overcome any challenges along the way. We believe in sharing our knowledge and learning from best practices. It's how we make sure we do things a bit better every day to create safer, smarter and sustainable places.

[www.amey.co.uk](http://www.amey.co.uk)

## About ADEPT

The Association of Directors of Environment, Economy, Planning & Transport (ADEPT) represents local authority county, unitary and metropolitan directors. Operating at the strategic tier of local government, members are responsible for delivering public services that primarily relate to the physical environment and the economy, but which have a significant impact on all aspects of the nation's wellbeing. ADEPT represents members' interests by proactively engaging central Government on emerging policy & issues, promoting initiatives aimed at influencing Government policy, and through the development of best practices and responding to European and UK Government initiatives and consultations. Our wider membership includes Local Enterprise Partnerships, Combined Authorities, Sub-national Transport Bodies and Corporate Partners.

[www.adeptnet.org.uk](http://www.adeptnet.org.uk)



## Change Associates

Change Associates is a business transformation, leadership and performance, and change management consultancy based in New York and London. We deliver global projects through an international network of experienced consultants.

Our agile associate model brings together an international community of highly engaged consultants, many with Big 4 experience and all experts in their field with a strong track record of delivery.

This unique approach gives us the flexibility to respond to your needs at each stage of your project. You get the resources and expertise you need at the time you need them. We apply our experience to your organisation's culture to make a sustainable change.

Which means change happens successfully and cost-effectively.

[www.changeassociates.com](http://www.changeassociates.com)