Section 5

Measuring the Experience

HM Government

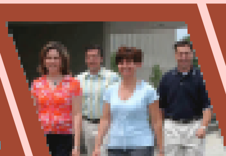
INTRODUCTION

Measuring the Experience is about getting a quantitative measurement of the customer experience. It will often follow customer experience mapping and/or mapping the system, and allows you to measure customer satisfaction and understand numbers and costs associated with a process, system or experience.

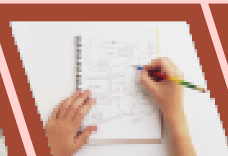
In this section we describe how to apply measurement to a customer experience using deep customer understanding, moving through to taking action and evaluating results. In doing this we've assumed you have already mapped either the experience or the system, and so have not repeated here all the tools in those earlier sections of the guide. If you haven't carried out this earlier mapping, refer back to the earlier sections as referenced in the text.

Five steps are covered in the pages that follow:

Set up – the mapping context

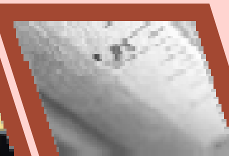


Gathering information



Constructing the map

Taking action



Evaluating results

GREAT FOR

Measuring the experience is important because it:

- Enables you to understand the key things that are most important in shaping the customer experience and driving customer satisfaction. This means you can focus time and resource on the things that matter most to your customers
- Helps you understand the role that external factors play in influencing the customer experience so you know what you can and can't control
- Gets everyone involved in the customer experience aligned, focused and motivated to deliver the service that will truly satisfy the customer.

This section describes the third mapping approach and sets out steps and tools to help.

ON-LINE CONTENT

Core tools are included in this guide but there are more in the online toolbox.

Measuring the Experience

SEE ALSO

See also CIF's guidance – "Promoting Customer Satisfaction", which has been used in producing this section.

HM Government

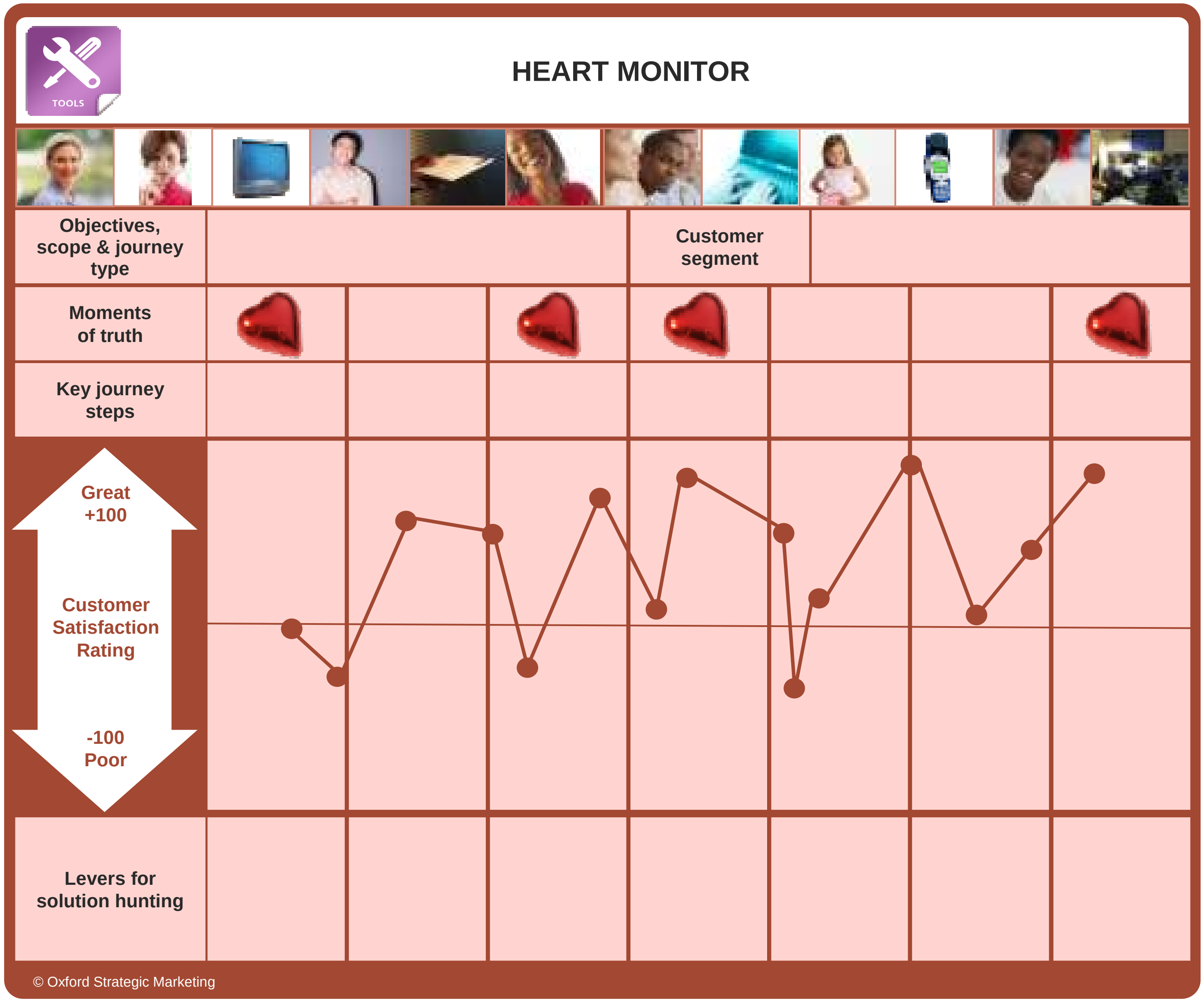
This is the key tool we'll be using in this section. You may have already used a Heart Monitor to map an experience qualitatively, but here we are using it to map output from quantified customer research.

Measuring the Experience

When you are using the heart monitor with quantified data, the ratings here will correspond to those used in the customer research that you carry out.

KEY OUTPUT

The Heart Monitor tool graphically illustrates the highs and lows of your customer journey, mapping the output of quantified customer research. It can correspond to steps on either a customer experience map or a system map.



SET UP – CHECK THE CONTEXT

Assuming that you have already mapped the experience or system qualitatively, you should have already defined objectives, scope and target customer segments. If so, you need here simply to confirm that they still hold true for the quantitative research you are going to carry out.

Checking the context:

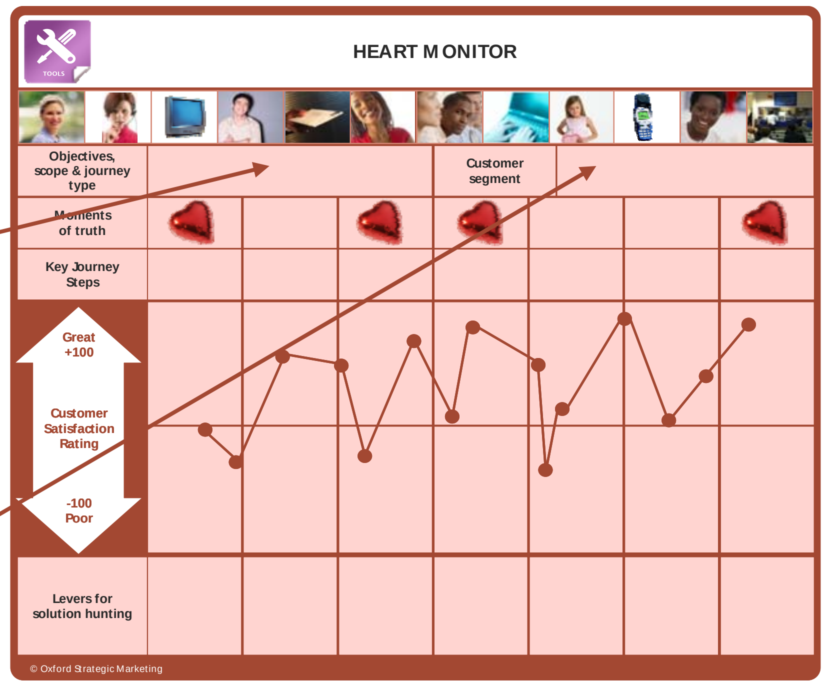
- Are the objectives and scope of your project the same as before, or have there been changes?
- Is the journey the same one that you defined earlier? Did any changes come out of earlier mapping exercises that you need to reflect here?
- Are you still considering the same customer groups? Do you need to split any out or merge any groups together?

If there have been changes to objectives, scope, journey type or customer segment, you need to carefully rethink the implications of these. If necessary, go back to the earlier set-up sections (page 23 for experience mapping and page 57 for mapping the system) and work through these again.

Once you've confirmed the context, you can go on to set up your map or maps as before:

Objectives, scope and journey type
What this mapping needs to do.
Single, well-defined journey with clear start and end points.

Customer segment
The specific group you're mapping here, with key defining characteristics to distinguish them from other groups.



If you haven't carried out a qualitative mapping exercise, you need to establish the context for you mapping. Go back to pages 23-25 in Section 3 for guidance on set up and the mapping context.

Measuring the Experience

HM Government

If you have already carried out qualitative customer mapping, this should help to guide the planning and execution of your quantitative research. It will help define the exact journey you map and ensure you are asking the right questions of the right people.

Make sure that any agency is absolutely familiar with the work done already, and keep stakeholders and customer-facing staff involved so that they can input to the new research.

Measuring the Experience

ON-LINE CONTENT

The online toolbox contains more tools about gathering information

For local government there is also useful advice in the Customer Insight Protocol – see page 9 for details.

GATHERING INFORMATION

Gathering quantified information for customer mapping will usually be done with the help of an agency, who can handle large numbers of people and carry out statistical analysis.

The best starting point is your Insight team if you have one. If not, talk to a member of the Customer Insight Forum, who will be able to advise on this (see page 9).

It's also worth using the CIF publication – 'Promoting Customer Satisfaction', which gives lots of general information about who to talk to and what to ask when conducting customer research. See page 9 for details.

Remember to look also at what you already know about your customers, to avoid duplicating existing work, wasting time and resource. Are you starting from scratch, or are you well on the way with an existing study that can provide you with some of the information required?

Sources of Existing Information:

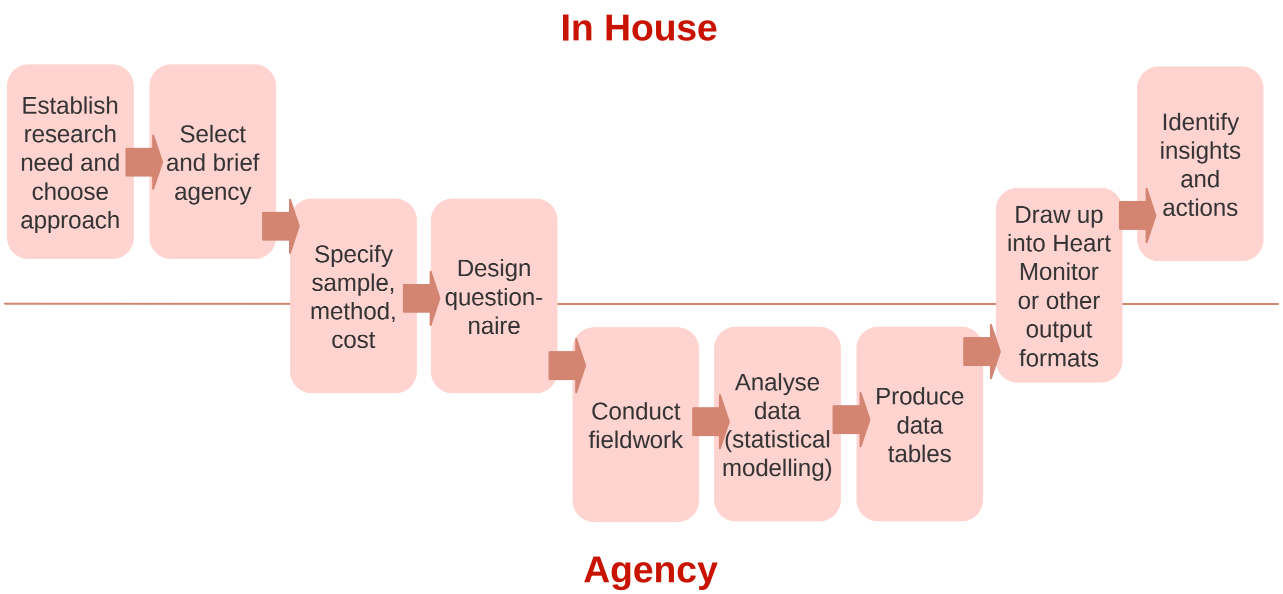
- Administrative Data : can be a rich source of information for organisations. This can include call volumes data e.g. waiting times, 'hang-ups' and answered calls, website statistics e.g. number of people visiting website, pages viewed and return visits, applications data e.g. benefit claims over a period of time
- Complaints Data : can be used to identify current areas for improvement as well as to inform areas to be included in research to measure the experience
- Mystery shopping data : many organisations conduct mystery shopping in order to monitor the services being provided to its customers. This can be a valuable source of information and can inform areas to be covered in research to measure the experience
- Existing survey data : taking time to find out what survey data already exists is a valuable process that often gets overlooked. Different research may be carried out by different teams, so look widely

BRIEFING AN AGENCY

You need to ensure that any external agency used for quantitative fieldwork is absolutely clear about what information you need, why you need it, and how it will be used.

Talk to your insight and research professionals about agencies you might use (not all agencies will do this kind of work) and how best to use them. You could use them just for the fieldwork, or could get them to deliver a completed heart monitor. The tool here sets out key steps in the process of carrying out journey mapping research and indicates which jobs are usually done in-house, which are generally done by an agency and which can be done by either, depending on resource, budget etc.

RESEARCH PROCESS AND RESPONSIBILITIES



Overleaf there's a further tool you can use - a template, with headings and prompt questions, to help you to brief an agency or internal research function.

If you have an insight or research function, use it as a first point of contact.
Your brief can go to the people in that function and they will then select and brief an agency.
COI have experience in this area and might also be able to help, and
CIF can advise and support you.

Research fieldwork (the actual data-collection part) can be done using all the customer closeness techniques described in Section 3. When briefing agencies, encourage agencies to be creative in the approaches they use to collect and feed back information.

Measuring the Experience

BRIEFING TEMPLATE

Gathering quantified information for customer mapping will usually be done with the help of an agency, who can handle large numbers of people and carry out statistical analysis.

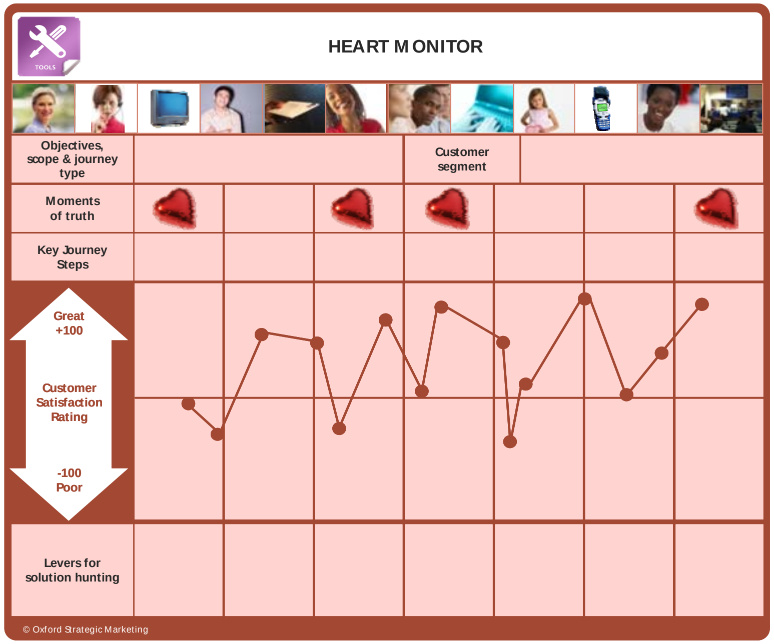
TOOLS

RESEARCH BRIEFING TEMPLATE

Subject	• What you would need to tell someone who knew nothing about this in order for them to understand what you're talking about?		
Objectives, scope and journey type	• As laid down when you set out your maps	Customer segment	• As laid down when you set out your maps
What issues are you looking to resolve?	• What's the overall challenge (as defined at the start of the project)? • Where do you believe the problems lie (based on your initial qualitative mapping)? • Why are you doing this research – what are the key triggers (policy change, customer dissatisfaction, operational issues, cost issues etc)? • What are the specific issues you need to address?		
Why is this important?	• What critical questions do you need the research to answer? • What exactly will you do with the results? • What benefits will result, to you and to the customer, if your project is successful? • How might the customer experience be improved? • Are there any mandatory requirements that you have to deliver on?		
Practicalities	• Identify the journey steps and moments of truth as you currently understand them • What budget is available for this work? • When do you need the results? • Are there any immovable deadlines? • Are there any issues that might cause problems or delays? • In what format would you like the results to be delivered?		

CONSTRUCTING THE MAP: INTRODUCTION

When the research has been done and data is available, you can begin to complete the heart monitor format. The core section is the middle part, where you need to plot the scores recorded during the research.



You should have filled in the top boxes of the map in the set-up stage.
In this stage we'll cover how to fill in all the remaining parts of the map

A few simple principles for filling in the map:

- As with all journey mapping, remember that the starting point is the customer – it's the customer's heart you're monitoring. Forget the internal perspective – stand in the customer's shoes
- The tool is at its best when you have quantified data for the journey steps, but where this isn't possible the heart monitor can be completed using qualitative information
- Write in everyday customer language and avoid internal terms or jargon. This approach may be quantified but it can still be emotive.
- Be realistic in the steps you choose to map. In a detailed process with many steps, try to focus on the important areas rather than getting lost in unnecessary detail

Make the map as visual as possible. It's a fantastic tool for engaging people so use outsize paper, colour, quotes & photographs to bring it all to life.

HM Government

This page shows the steps you need to go through to complete a heart monitor like the example opposite.

The following page gives hints to help you in this process.

Measuring the Experience

HOW TO CONSTRUCT A HEART MONITOR

TOOLS

CONSTRUCTING YOUR HEART MONITOR: KEY STEPS

Step 1: Confirm the key journey steps

- Review the research you have done to ensure that the journey steps that you set out to investigate still hold true. Do customers agree with the start and end points you identified?
- Look at the chronological order - challenge to make sure you've got the sequence right
- Ideally you want to map around 6-10 key journey steps. If you have more than that choose the ones that are most important

Step 2: Plot the highs and lows of the experience

Use the research results to plot the following information:

- For each key step, identify the priority service elements from a customer perspective
- Record each element, using customer language
- From your research, plot the satisfaction level for each element
- Are there still gaps in your understanding? Consider further research or analysis if so

Step 3: Identify moments of truth

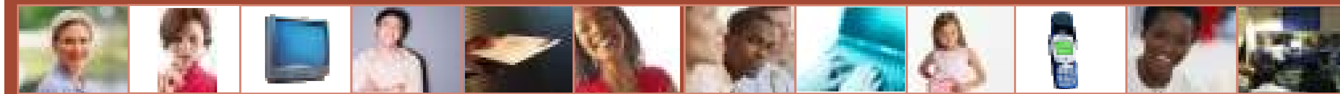
- Identify the pivotal points where customers are highly emotionally engaged or challenged (see tool for helping do this on page 88)
- You're looking for 3 or 4 occasions where customers may consider quitting, coming back later or not at all
- Do you understand what's happening at moments of truth? Customer satisfaction scores at these points are crucial to understanding how to transform your offer

Step 4: Identify levers for solution hunting

- For each step, identify the things that are driving satisfaction levels
- Confirm which of these are things that you can control, and assess which offer opportunities to optimise the customer experience
- Consult the list of levers on page 49 to decide which you can use in this process

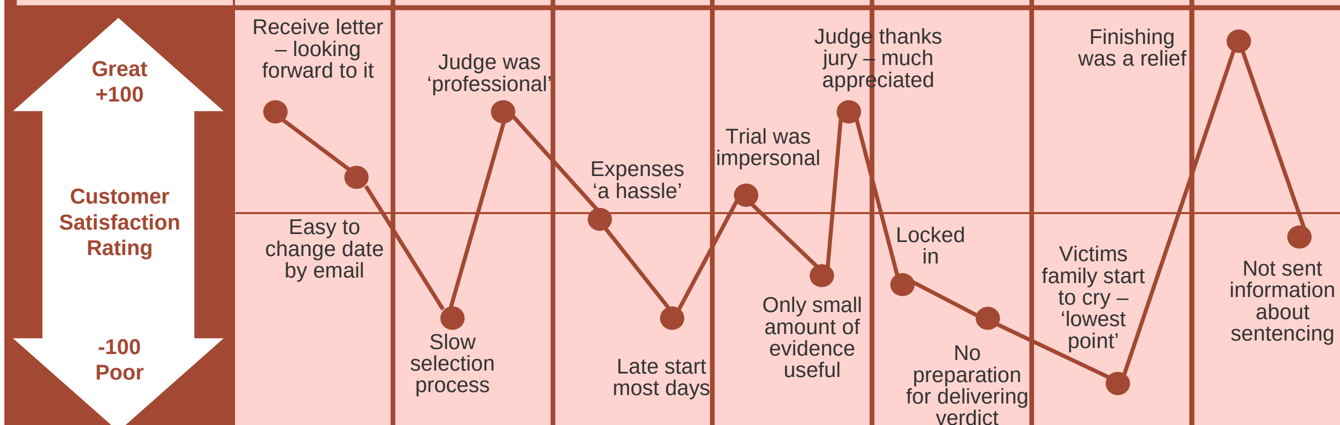
EXAMPLE: MINISTRY OF JUSTICE

HEART MONITOR



Objectives, scope & journey type	**Track the process experienced by jurors to improve levels of service**	**Customer segment**	**Jurors**

Moments of truth	♥		♥	♥			♥
Key journey steps	**Receive summons**	**Jury selection**	**In court pre-trial**	**In court – during trial**	**Deliber-ation**	**Delivery of verdict**	**Post trial**



Levers for solution hunting	Comms: Manage expectations Channel: 24 hour access	Customer face: Explain delays Environment: Make the wait as painless as possible	Process: Simplify expenses system Look at time-keeping	Comms: Make jurors aware of role played by all the evidence	Environment: Provide adequate facilities Comms: Brief on verdict delivery	Customer face: Talk to jurors – stress the importance of what they've done	Comms: Ensure follow-up letter goes out re sentencing

This is based on an actual example of a heart monitor created by the MoJ and HMCS. It's been shortened for simplicity and reworked slightly into the formats used in this guide

Measuring the Experience

Measuring the Experience

TOOL: FURTHER ANALYSIS

KEY DRIVER ANALYSIS: IDENTIFYING MOMENTS OF TRUTH TOOL

Your research study should provide you with a list of the factors that will result in an improved customer experience, but it may be quite long. You need to uncover the key drivers, those we call the moments of truth.

Key Driver Analysis uses statistical modeling to isolate these important factors. You'll need to get experts involved in this bit. The output can be presented in a user-friendly format that can communicate the findings and the necessary actions to all staff, whatever their prior knowledge or experience.

You can bring the moments of truth to life by exploring them further through qualitative research. This can also examine the issues in more detail to get to the route cause of the dissatisfaction. For example, customers may be unhappy with the Call Centre response, but it may be the connection process rather than the staff dialogue that is driving concern.

Verbatim comments from customers can also illustrate the findings in a more powerful way than charts or numbers. They can get to the 'heart of the matter', key for this kind of measurement.

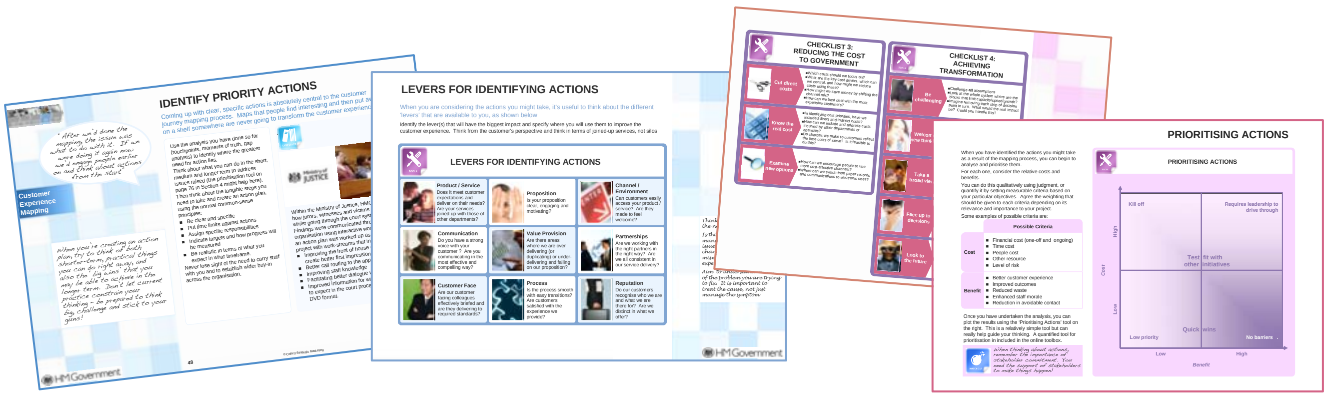
CASE STUDY

DEFRA used a review of existing research to identify moments of truth or 'pain points' for farmers.
The exercise provided a valuable gap analysis for customer needs, which informed decisions on policy and service delivery.

TAKING ACTION

You now need to use the all of the information you have pulled together.

To do this, you can use all the ‘Taking Action’ guidance in sections 3 and 4 of this guide – see pages 45 to 52 for customer experience mapping and pages 74 to 76 for mapping the system.



In particular, focus on the actions that you can take with confidence now that you have quantified information, for example:

- Making a business case and selling an initiative to stakeholders
- Identifying the points in a system where you should focus effort and resource
- Making decisions about priority groups
- Deciding where and how to develop new channels.

The prioritisation grid (page 76) can help at this point.

The Heart Monitor tool is a fantastic visual displays of where you need to focus attention.

Use it in presentations, but also consider making a large version available, putting it in a visible location, e.g. by the photocopier so that it acts as a reminder for staff.

Keep it updated when new results are available. Detail actions in progress and areas where improvements have been seen.

“The power is in the story telling. We’re bringing in comms people to tell the story – we’re working as a team”

Measuring the Experience

EVALUATING RESULTS

When planning your actions you should have included how you will measure success.

As before, you can refer back to the earlier sections of this guide for ideas on evaluating results, such as benchmarking (page 74) and using metrics (page 77).

Having this quantified study gives you a perfect benchmark. By repeating it again at some point in the future, you can re-plot the experience and look at how people's thoughts, feelings and levels of satisfaction have changed over time.

HM Government