

## insight:

understanding your citizens,  
customers and communities

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# 1. foreword

**This guide is aimed at officers and members who are serious about understanding their local citizens and communities.**

As a chief executive, I face the challenge of meeting citizens' needs and aspirations. As a council we have to work with our partners to fulfil our ambitions for our area. We want to achieve the targets in our local area agreement (LAA), make sure the right services are delivered to the right people at the right time and, of course, respond to the comprehensive area assessment (CAA)!

'Customer insight' is nothing new. Councils have always gathered a lot of information about their communities through consultation and analysis of feedback about services, as well as through the daily activities of members and front-line staff. But often that information remains untapped or fragmented across different parts of our councils. Nor have we always been successful in drawing on the insights of our public service partners or the third sector.

Meanwhile, new tools, techniques and sources of insight have become available. Although many of these innovations have been pioneered in the private sector, they are being rapidly adopted by leading councils for public ends.

Within my own council, Chorley borough council, use of insight has enabled us to make efficiency savings by reducing unnecessary contact as well as helping us to become nationally-recognised as a beacon council for transforming services around the needs of individuals and families.

This guide examines how customer insight can help us do a better job. It gives an overview of recent developments, highlighting potential sources of insight (including the information we already have) and the tools now available. It sets out the skills we need, as well as pointing to sources of help. There are many real examples in this guide of councils who have used insight to help them make improvements.

Some key themes that I think are important are:

- exploiting insight is more about having the right culture than about investing in particular sets of data or techniques;
- there are real benefits to working in partnership, sharing knowledge and skills not just with other councils but also with public and third sector partners;
- we need to 'institutionalise' our use of insight, so that it is at the heart of everything we do, from working with our partners on our LAA targets to planning and delivering specific services.

All of this will require leadership. We will need to have a clear vision of what we want to achieve and the foresight to invest in the right structures, skills and systems. We all have a part to play.

I strongly believe that we will be more successful if we share experience and learn from each other. I am therefore delighted to chair the recently established Local Government Customer Insight Forum, which will help highlight and share good practice, as well as making links to developments in other sectors. Chapter 8 of this document gives more information.

I look forward to working with you to develop our use of customer insight and commend this guidance to you.



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**Donna Hall**  
*chief executive,*  
Chorley Borough Council and chair,  
Local Government Customer  
Insight Forum



## 2. introduction

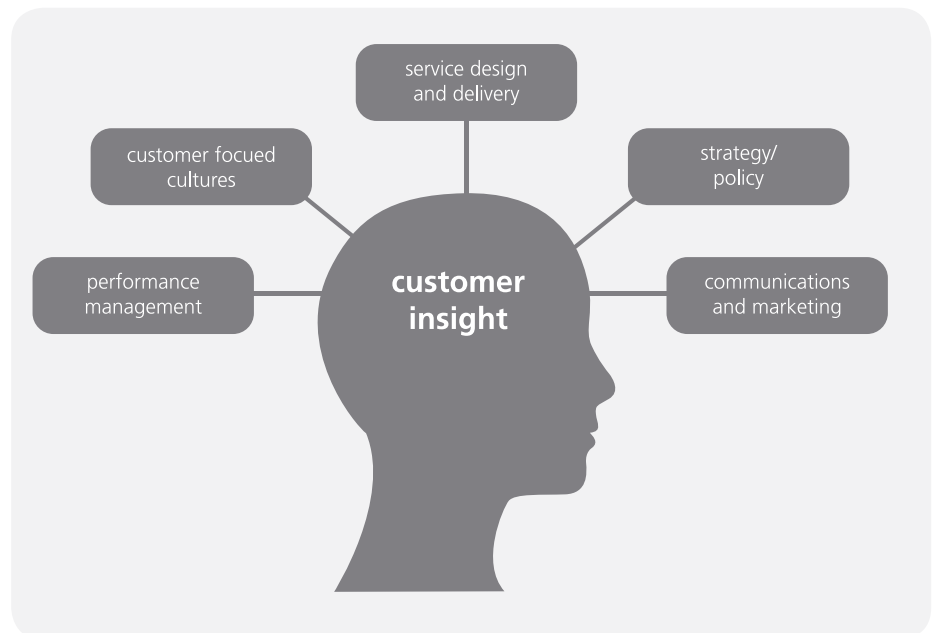
**Customer insight is rapidly rising up the agenda for public sector organisations. Public expectations of local services are growing, and only by truly understanding what is really important to people can a service be efficient and effective.**

Insight is therefore one of the key tools available to councils to redesign services in ways which save money and improve customer satisfaction.

A deep understanding of customers and citizens should sit at the centre of all public organisations. Insight informs all aspects of operation from generating a strategic understanding of communities, to managing performance, through to understanding the target audience for particular services or campaigns.

This guidance is aimed particularly at strategic decision makers; notably chief executives, directors and heads of services, who are seeking to enhance their organisation's understanding of citizens, customers and communities through better use of data and information.

This guidance will help councils make practical progress with citizen and customer insight. It provides an introduction to individual tools and techniques, examples of how insight has been used in practice and signposts to the best sources of more comprehensive information. More detailed case studies are available in the online version of this guidance and the appendix contains details of further sources of guidance and support.



### 3. context

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

Being effective users of insight is not just about being able to collect data and information. It is about having:

- a **culture** which values insight and is willing to act on it;
- the **skills and capacity** to distil customer data and information into knowledge;
- the **embedded processes** that put this knowledge at the heart of all business planning and performance management.

Recently there has been a groundswell of interest from councils in understanding and applying insight techniques. Some councils are further along this journey than others. All can make further progress, because developing and applying insight is a continuous cycle.

In particular councils at all levels should be looking to:

- mainstream the use of customer insight so that it is embedded in all processes and practices;
- work together to share information and data, and utilise each other's knowledge and skills;
- generate enthusiasm by demonstrating successes and sharing best practice.

The changing **performance framework** for local government puts more emphasis on understanding citizens; for example:

- **comprehensive area assessment (CAA)** requires councils and their partners to demonstrate they understand what their citizens want and need, as well as how they are meeting these needs;
- **local area agreements (LAAs)** require a thorough evidence base for choosing and monitoring outcomes;
- **national indicator 14** on reducing avoidable contact requires a comprehensive understanding of the way customers access services;
- the **'duty to involve'** puts expectations on authorities to involve citizens in the design and delivery of services, rather than simply consulting them.

### challenges

Some examples of the key challenges facing councils seeking to deliver and use insight techniques are:

- sorting through all the new language and definitions to establish a common terminology across partners;
- understanding what data and information exists and how it can be applied;
- developing the capacity and skills to undertake customer insight work;
- turning insight into action and being able to demonstrate the tangible benefits from investment in customer insight;
- understanding and working within data protection constraints;
- sharing information with partners and across two-tier areas.

## 4. what is customer or citizen insight?

Terms such as customer intelligence, customer insight, citizen insight, customer focus and being customer-centric are often used interchangeably and can be a source of confusion.

Customer insight was first used in the private sector to describe firms' understanding of people's emotional, 'gut' reactions to commercial products. This meaning has less relevance in the public sector. Instead, a commonly-used definition of customer insight in government guidance is:

"A deep 'truth' about the customer, based on their behaviour, experiences, beliefs, needs or desires, that is relevant to the task or issue and 'rings bells' with target people" (Government Communication Network Engage programme).

In practical terms, insight entails:

- the **use of data and information** about customers to better understand their needs, wants, expectations, behaviours and experiences; and
- the active **application of this understanding in the design and delivery of services** that better meet customers' needs.

To become a truly customer-focused or customer-centric organisation, this insight needs to be embedded across all aspects of the organisation, from planning and decision-making to the delivery of front-line services.

### myth busting

- Customer insight **is not just about collecting or purchasing data**; lots of data actually exists already; often it's about synthesising this into useful insight and applying it.
- Insight is **not just undertaking demographic segmentation**; it involves using a range of data, tools and techniques to generate a rich understanding of customers.
- Customer insight **is not a one-off activity**; but an ongoing journey of change.

### customer or citizen?

In this guidance we have referred primarily to 'customer insight' as this term is well established in both the public and private sectors. But, for some, this does not reflect the importance of the council's role as community leader, partnership working, or the role that active citizens play in engaged and empowered communities.

Customer insight can be used to mean understanding the views and experience of customers of a particular service to make improvements. But in public service its scope is far wider. It should incorporate analysis of the broader needs, experiences, behaviours and preferences of everyone in an area including residents, businesses and other organisations.

Councils and their partners need to understand both their citizens and their customers. In fact, citizen and customer insight are linked; without understanding their wider community councils may miss the needs of potential users of services or potential deliverers of services – for example concerned citizens, community groups or carers - who could share in helping to achieve complex outcomes. They also need to use insight at a strategic level to inform planning and decision making, community engagement and improvement.

While the exact term used in practice may vary, the tools and the principles used for both customer and citizen insight are broadly the same.

### 'selling' citizen insight

Those that recognise the need to develop an insight capability can struggle to demonstrate its value internally. Effective use of insight can help you:

- deliver tailored services that are more efficient and effective;
- target resources towards priority groups or services;
- develop responsive services that encourage and reflect citizen engagement;
- enhance customer service and improve satisfaction;
- demonstrate your understanding of your community in CAA.

More and more case studies are emerging that demonstrate tangible benefits from applying insight. Join the Improvement and Development Agencies' (IDeA) Communities of Practice [www.communities.idea.gov.uk](http://www.communities.idea.gov.uk) to access the latest material.

## 5. using customer insight

All customer insight projects and programmes should start with a clear sense of how the knowledge will be used to make decisions. Some of the principal applications within local government are:

### **To inform strategy and policy:**

Information on customers and citizens can be used to inform decisions and to input into policy or scrutiny reviews.



**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. The resulting partnership working has, according to the 2006 direction of travel assessment, "helped to deliver regeneration benefits in town centres and to reduce fear of crime".

### **To allocate resources:**

resources can be prioritised to areas of greatest need, such as targeting at neighbourhood level, or to identify vulnerable or under-served groups.



**Camden Council** is tailoring the location and services offered by its customer access points to target specific customer groups and allocate resources more effectively. Camden has decided to rationalise over 40 face-to-face points to just three or four based on a better understanding of its priority customer groups.

### **To manage performance:**

understanding customers' needs and experiences can help you understand where services are performing well or badly as well as what you might do about it.



**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. Since starting in 2006, 130 improvements have been implemented.

**To market services more effectively:**

understanding different groups of customers makes it possible to market services more effectively, such as being able to encourage take-up of services or different channels by particular groups.



**Sunderland City Council** used customer segmentation to identify which groups were not paying by direct debit and their preferred communication channels. The council subsequently advertised the direct debit service in specific locations, such as the inside of buses, and provided payment options to meet these groups' requirements, including a weekly payment option. Partly as a result of these initiatives, payment by direct debit has risen from 62 per cent to 67.2 per cent.

**To change behaviours:**

social marketing techniques that employ a deep understanding of the customer to provide information, products and services can be used to change people's behaviour, for example in road safety or smoking cessation initiatives.



**Knowsley Primary Care Trust and Knowsley Metropolitan Borough Council** conducted a social marketing campaign to support healthier lifestyles amongst 50-65 year old men. Initial market research, including street interviews, focus groups and pilot health checks, ensured that the target group strongly related to the campaign's humorous tone, key messages and communication channels. Of the target group, 57 per cent were aware of the campaign, 3,000 had health checks and 85 per cent of those followed-up made positive lifestyle changes as a result.

**To improve service design:**

knowing what customers want and need from a service can help identify areas of weakness and feed into the design of services that meet their needs and preferences.



**Derbyshire County Council** is currently using customer journey mapping to redesign several services including staff recruitment and social care services. These reviews have resulted in specific recommendations such as providing hints and tips as well as an approximate interview date for online applications.

## 6. developing customer insight in your council

Customer insight is not a one-off activity but an ongoing programme that evolves alongside changes to:

- citizens and customers;
- their needs and preferences;
- your political priorities;
- the local, national and global policy landscape.

Customer insight should not be treated as a separate service or run through different governance structures. Instead it should be incorporated into everyday mechanisms for performance management, decision-making and engagement.

Councils that are making strong progress with insight generally display strong leadership. The cross-cutting nature of customer insight creates a key role for senior members and officers to promote and drive the use of customer insight both within a council, as well as across partner organisations. Having a senior director with responsibility for actively driving customer insight, as well as a chief executive with an active interest helps ensure that insight is seen as important across the council.

The customer insight models that are emerging in councils comprise a combination of people and skills, processes and systems:

**Chorley Borough Council** has recently undergone a radical restructuring, driven by both the new chief executive and leader. The council is now structured around three customer groups:

- people;
- businesses;
- neighbourhoods

Structuring services in this way allows the council to pull together its understanding of the changing needs of particular customer groups. Tailored packages of services are now being delivered to specific neighbourhoods by the council and service partners, including home safety and benefit assessments, flu jabs and assisted rubbish collection.

**Councillors** are essential for effective insight and play a key role in insight programmes by:

- asking for and promoting use of insight as part of decision making, supplementing what constituents have told them with robust data;
- using insight in scrutiny reviews;
- receiving and sharing information on their communities through their frontline role.

## people and skills

In practice, the development of insight is often driven by an internal team. The central insight team will often act as a recognised pool of capacity and resource for insight with access to data and information, as well as knowledge of tools and techniques, and the ability to bring them together.

Some of the skills required for insight are similar to those that already exist in a council or among partners, for example, in policy and performance, consultation, research and customer service teams. You do not necessarily need to procure large amounts of new skills. But you will need people able to:

- analyse and manipulate data;
- present and use data to inform strategy and policy;
- understand and use market research techniques and methods;
- communicate the results of insight analysis in a way that makes an impact on the audience;
- enthuse and engage effectively with others across the organisation.

Professional networks are available through the IDeA and the Local Government Association (LGA) which can help link staff working on insight to share best practice and develop skills.

## processes

An organisation needs established processes by which information is collected, analysed and disseminated, and through which insight is used to inform other activities of the organisation. Key business processes which should be informed by customer insight include:

- service planning - ensuring that all service plans start with a description of customers and their experience of the service;
- business cases - requiring all business cases to incorporate an analysis of the impact on different customer groups;
- engagement and empowerment understanding which communities are stakeholders for specific policy issues and bringing together a range of existing views.

## data and systems

Good data is the bedrock of insight analysis and information collected about citizens' needs to be able to be stored and shared within and between organisations. Data sets (particularly those purchased externally) need to be accessible from one place and be available to the rest of the organisation. Development of a single customer view of individuals' interactions with the council is critical to establishing a single, clean data source on individual customers which can then be used to develop reliable analysis of customers. Data Connects has established a business case for developing a single customer view and produced guidance materials which are available through the London Connects website <http://www.londonconnects.gov.uk>

### West Sussex County Council

is undertaking a three-year fundamental service review programme that must include consultation as part of the first stage. Services are redesigned to meet customers' needs, wants and expectations in terms of quality, value and choice. The programme is being driven in part by a dedicated customer insight team. The team is led by a member of the senior management team and has four staff with a combination of data analysis, customer focused appraisals of services and community engagement skills.

### The London Borough of Hammersmith and Fulham

has developed a system that alerts all relevant services to changes made to customer records. This has led to more consistent, up-to-date customer data across the council. The electoral services team has used the system to increase voter registration by targeting people flagged as having moved to new properties.

## getting started?

For councils wanting to move towards a full customer insight capacity a common path is to:

- identify the **objectives** for using insight;
- undertake an **audit** to understand what people, processes and data you have already;
- develop a **model** for customer insight in your organisation and a plan for getting there;

- learn by undertaking a **pilot** to help build skills and stimulate demand across your council;
- inform work with an understanding of what is happening elsewhere by searching the Communities of Practice and case studies available.

Successes should be communicated back through the organisation to encourage the further use of insight techniques.

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**More? See** *Establishing an Effective Customer Insight Capability in Public Sector Organisations* (**Cabinet Office**)

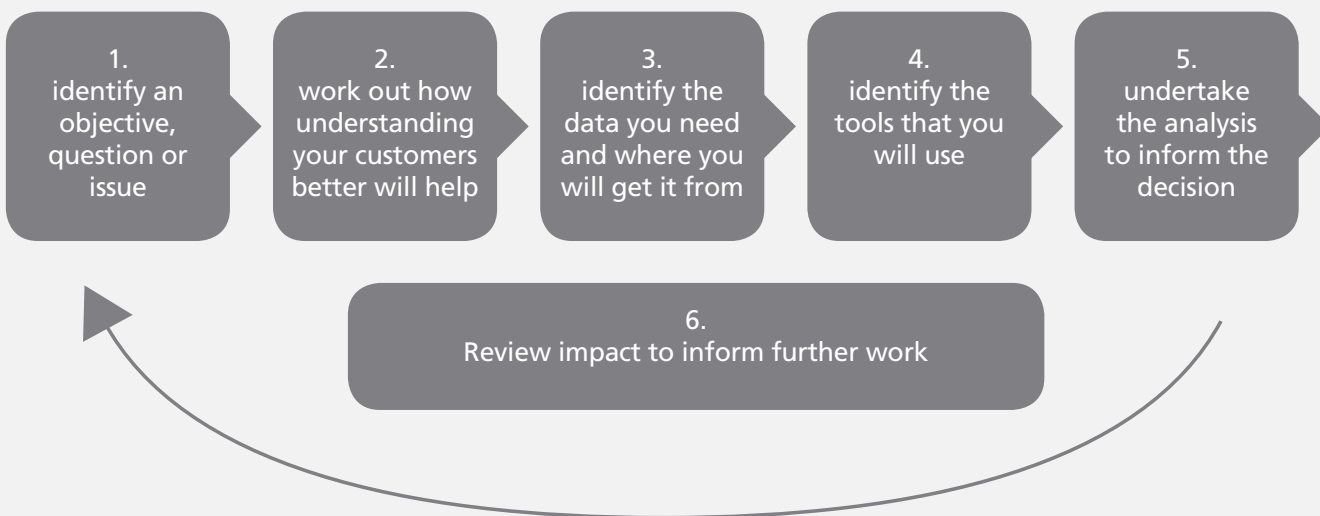
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The **ESD toolkit** provides a helpful resource and over 20 councils have signed up so far:

- it profiles communities and the services being delivered to them, as well as costing proposed changes;
- it is developing case studies for councils to use;
- it offers guidance on how to manage data;
- it supports customer insight in partnerships by establishing a common language for discussions.

## Running a customer insight project:

A suggested approach for running a project



### **Walsall Metropolitan Borough Council**

and its partners have established three customer insight groups with distinct remits who work together to break down information silos, share best practice and drive through change:

- a corporate consultation group with representatives from all service areas which ensures that valuable customer intelligence is co-ordinated and shared across the council and increasingly across the partnership;
- the Improving Customer Experience (ICE) management team including heads of service and senior managers has played a key role in the development of a customer service strategy and customer care values;
- a strategic partnership engagement forum including representatives from local service partners including the PCT, housing associations, strategic partnerships, the local fire and police service which works to help better co-ordinate consultation, share results, best practice and join-up on key partnership projects.

### **Nottinghamshire County Council**

undertook a baseline exercise to create a snapshot of how customer-focused the organisation was. From this, a range of improvement activities were identified, including enhanced consultation activity, analysis of complaints and dissatisfaction to inform NI14 work, and piloting segmentation analysis within the library service to identify groups that were under-using the service.

After receiving a low level of satisfaction in the latest BVPI survey, the **Croydon Council** wanted to understand how it could improve residents' satisfaction. They recognised that by better understanding the root causes of low satisfaction for different customer segments, the council could begin to tackle these causes, deliver services more focused to its customers and drive up satisfaction. The project team is using a combination of internal data, survey information and external data sets alongside customer segmentation, focus groups and detailed analysis of customer information, eg complaints, to develop this understanding.

## 7. customer insight for CAA and partnerships

With the advent of the comprehensive area assessment, councils will have to demonstrate that they understand what their citizens want and need and that they are meeting those needs effectively. Moreover, they will have to demonstrate a collective understanding, shared with partner service providers. The detail of CAA is still evolving, but guidance is clear about the expectation that local partners will:

- be able to demonstrate an understanding of their community, particularly of vulnerable groups and that local priorities reflect these needs and aspirations;
- seek to improve the customer experience of services on a range of levels, and will tailor services to local needs.

Crucially, councils will need to have a coherent and structured way of approaching customer insight. CAA will not provide a single road map to direct them along this journey, but allows councils to develop approaches that suit their needs.

In practice, partners can work together to:

### 1. share information

CAA outlines the need for local partners to understand their communities and to use this information to inform priority and objective-setting. Individually, partners hold large amounts of data which when shared can develop a richer picture of their communities and help to plan joint responses. Customer

profiling can help to build a common understanding of the population and, in particular, of vulnerable groups.

The *Customer Insight Protocol* developed by the LGA, IDeA and the National Consumer Council (now Consumer Focus) provides useful information on how to share survey information between partners and how to anonymise data.

### 2. pool resources and skills

It may be harder for smaller councils to invest heavily in customer insight. But, by working together, councils can pool resources and staff to manage data and undertake projects. Districts in particular may find it difficult to establish significant areas of dedicated capacity within their own organisation and sharing resources can help.

### Data protection

NB This commentary is based on documents available from the Information Commissioners' Office. It does not represent legal guidance and we would encourage councils to review the original source material.

Customer insight often involves sharing and manipulating large amounts of personal information and is accordingly subject to data protection constraints. The Data Protection Act does not prevent councils from sharing personal information but care does need to be taken. Personal information should only be shared when sharing is necessary in order to carry out a

particular statutory duty or achieve a specific goal. Being clear about what you want to achieve will help determine the minimum amount of personal information you will need to share to achieve your goals. It will also aid in determining how this can be done securely. Where possible councils should undertake a privacy impact assessment, which should identify the intended benefits and demonstrate that any intrusions into individuals' privacy and any data protection risks have been identified and will be managed.

Where personal information is held, clear policies about security and retention of information should be developed and adhered to.

For the purposes of the Data Protection Act a council is a single organisation and the appropriate sharing of personal information **between departments** within a council will usually present no problems. The most pertinent data protection principles in this situation are the first and second principles of which more detail can be found on the Information Commissioner's Office (ICO) website.

Councils must take care to ensure that information shared between departments is only used for purposes which are not incompatible with the purpose for which the information was originally collected. For example if personal information has been collected for the purposes of administering

housing benefit, then it should only be shared with departments which will use it for benefit related objectives.

Where personal information is being **shared across organisations** greater care must be taken to comply with the Data Protection Act. When an organisation collects personal information it has an obligation under the Data Protection Act to explain to individuals what it will do with this information. If it intends to share this information then it must be open with individuals about this. Individuals also have the right to request information about them which is held by partners and this right should be publicised and advertised.

Developing an **information sharing protocol** can help you work through with partners what should and should not be shared and start to facilitate the flow of information. Common procedures and training modules for staff can then be created. The procedures should be implemented by all of the partners and disciplinary measures should be put in place to promote compliance.

Having addressed the sharing of personal data it is worth noting that for much customer insight analysis information will only be required at an aggregate level and **personal data can be anonymised**. When deciding whether to share personal information councils should always

consider whether their objective can be achieved by sharing information in a way that minimises or avoids the use of personal identifiers.

The information commissioner has developed a framework code of practice for sharing personal information which can be accessed at: [http://www.ico.gov.uk/upload/documents/library/data\\_protection/detailed\\_specialist\\_guides/pinfo-framework.pdf](http://www.ico.gov.uk/upload/documents/library/data_protection/detailed_specialist_guides/pinfo-framework.pdf)

Partner organisations in **Dorset** have also developed a protocol which could usefully be applied to other local areas. This includes a checklist for where information can and should not be shared and flowcharts to identify when information sharing is viable.

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**More? See:** [www.dorset.police.uk/pdf/OAISP\\_Final\\_V1.pdf](http://www.dorset.police.uk/pdf/OAISP_Final_V1.pdf).

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The Information Commissioner's Office produces detailed guidance for public sector organisations on all aspects of data protection including data security and retention policies. Please see the appendix to this guidance for further links.

### 3. stimulate demand

Sharing successes and best practice across organisations can stimulate interest in customer insight internally and generate demand for more insight. Benchmarking and comparing progress across organisations can help identify areas for improvement and development.

### 4. address specific cross-cutting issues

Dedicated partnership groups, in particular those established and governed through the local strategic partnership to meet specific priority outcomes that require joined-up working, such as reducing rates of child obesity, teenage pregnancy and crime, may want to conduct insight projects to understand how they can best achieve these objectives. Local partners may also wish to conduct joint projects, even where no formal group exists, to meet objectives where their services overlap.

#### The Sussex Improvement

**Partnership** is working with public sector organisations to join-up research and consultation resources, and share information, from across East and West Sussex. Work includes joint community profiling, sharing consultation portals and developing a practitioners' network. The partnership has also commissioned joint training for all members on particular approaches, such as public engagement.

#### Cheshire and Merseyside Public Health Group

of councils, PCTs and NHS trusts (ChaMPS) has used customer segmentation to identify customer groups most at risk from childhood obesity. ChaMPS then designed a social marketing campaign to encourage healthy eating in these groups, using different communication channels, including leaflets in certain postcodes, promotions in specific supermarkets and face-to-face advice. Early results suggest the campaign has led to a greater take-up of services aimed at reducing obesity, such as Healthy Start.

#### Your **Regional Improvement and Efficiency Partnership**

may provide support and advice. Improvement and Efficiency Partnership West Midlands for example is helping councils in the region to prepare for CAA through:

- carrying out an audit of intelligence available;
- supporting individual improvement projects and training elected members in the use and application of insight;
- disseminating and communicating practice via a dedicated webpage.

**Birmingham City Council** provides customer insight and segmentation analysis for Birmingham East and North PCT. This has deepened local health information by giving a richer picture of local need and preferences. By understanding that the area consists of a small number of distinct population segments, the PCT was able to tailor communications and services to make them more attractive and responsive to the diversity of local people.

Using customer insight and citizen segmentation, **Birmingham City Council** have analysed voting turnouts by constituency, wards and individual polling stations for 2008.

The Council have identified key areas where apparently low and high voting turnouts occurred and analysed the socio-demographic make up of the local areas to see whether this was explained by these differences. The yellow dots on the map represent polling stations with low turnout. Each colour on the map represents a different segment of the local population.

In response Birmingham are now looking for ways to increase participation across the city in future elections by targeting particular parts of the city.

Customer segmentation is addressed in the tools and techniques section of this guidance.



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## 8. insight tools, data and techniques

Customer insight is as much about organisational culture and working practices as it is about specific data sets and new tools. Nevertheless, there are a number of tools and techniques available to support your analysis.

### **analytical techniques for understanding citizens and customers**

Techniques exist to help you pull together and present insight to show who your customers are and their experience and preferences.

### **Customer segmentation**

Segmentation divides a target audience into groups that show common characteristics and needs in order to differentiate between groups' needs and experiences and target and tailor resources appropriately. Segmentation information is often combined with geographic information system (GIS) mapping to understand where segments are located across the borough.

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**More? See:** *Guide to Segmentation (LGA, IDeA and NCC)*

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**The London Borough of Barnet** has used customer segmentation to identify the demographic characteristics of customers that did not respond to an electoral canvass. It then used tailored letters and posters in specific parts of the borough to encourage registration amongst these groups. The numbers of adults registered has risen from 87 per cent in 2007 to 89.3 per cent in 2008 partly as a result.

### **Customer journey mapping**

A customer journey map is a way to describe the experiences of a customer through a life event, intervention or interaction with one or multiple services, and the emotional responses these provoke. Customer journey mapping can then be used to design improvements to services that reflect the customer's experience.

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**More? See:** *Customer Journey Mapping – An introduction (Cabinet Office)* and *Customer Journey Mapping Guidance (Lewisham)*


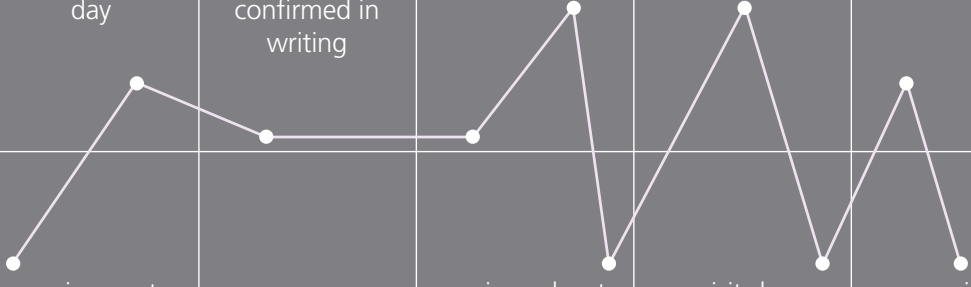
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**Lewisham Council** is at the start of a challenging three year customer services transformation programme to design 'better access to better services'. They have developed their own service transformation methodology to understand internal service delivery processes and the impact it has upon customer experience. This involves overlaying customer journey maps on internal process maps to understand the causes of poor customer experiences and the opportunities for improvement. A stakeholder challenge panel has been developed to assist with customer experience mapping work.

### The Journey

Derbyshire County Council's North East Business Services Team used customer journey mapping to gauge where improvements to services were required from the customer point of view. Satisfaction was measured against

stages in the process of a social services assessment. Where satisfaction is high, good practice can be gleaned. Where satisfaction is low, the service can be re-designed to meet the user's needs and improve outcomes.

key journey steps	initial contact	assessment	service start	review	closure
	returned call same day - assessment to be done next day	assessment completed. service to start - confirmed in writing	times given for visits	staff polite & helpful	experience good - prompt reply & staff good
					
	anxious not sure if right dept.		anxious about reliability	visits by different staff each day and at varied times	service cancelled by user - all fell apart due to timekeeping
possible solutions	provide more information to public about services	explain exactly what will happen during the assessment	keep to appointment times	make sure all staff have the right paperwork and know about the appointment times	plan the process better and improve time keeping

**Herefordshire Council** has developed a central consultation system which brings all consultation plans and results into a single database. The resource has been made available to the local strategic partnership, including the PCT and police. The system has helped to reduce consultation fatigue and encourage sharing of consultation information.

### **market research methods for understanding customers**

Using specific market research methods can help to generate information about your customers and citizens, how they experience services currently, and how they prefer to receive them in the future.

### **market research tools consultation**

Directly asking citizens what they need through consultation is a basic source of insight (and is often legally required). Neighbourhood charters and other local forums for agreeing priorities and delivery targets can serve as a way of understanding local preferences which goes beyond formal consultation. As with most tools, consultation is limited as it only reaches a small sample of the population and does need to be combined with other sources of information to bring about true insight.

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**More? See:** *How to consult your users* (**Cabinet Office**)

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### **focus groups**

Focus groups or panels are a more qualitative form of consultation that bring together a small number of service users or citizens to drill down into a particular issue or to understand detailed preferences. This can provide a rich source of information and examples to support data analysis.

### **surveys**

Surveys are a form of consultation and are a useful way of understanding citizen views in a quantitative way. The Place Survey will give you a starting point but you may want to undertake your own more targeted surveys to understand more specific questions. Survey data can be an especially useful input into segmentation exercises for example, to understand the relative satisfaction of different groups.

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**More? See:** *Developing measures of satisfaction with local government services* (**LGA, NCC**), *How to measure Customer Satisfaction: A Toolkit for Improving the Customer Experience in Public Services* (**Cabinet Office**) and *Customer insight protocol* (**LGA, IDEA and NCC**)

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### **mystery shopping**

Mystery shopping is an established private sector technique for gaining insight into the customer experience. Mystery shopping does however need to be carried out in a structured way to be effective. Some brief guidance is available in the Cabinet Office' *How to consult your users* and more detailed guidance can be found in: *Mystery Shopper Guide* (The Housing Corporation)

### **Rotherham Metropolitan Borough Council's Neighbourhoods & Adult Services Directorate**

uses a combination of market research techniques to better understand its customers, including:

- surveys across forty customer-facing teams to measure specific customer satisfaction outcomes, such as satisfaction with ease of contact and improved quality of life;
- a customer inspection service, where citizens mystery shop various services and assess the quality of contact points, such as reception areas;
- using video diaries to record customers' experiences throughout service journeys, including moving into social housing and applying for adaptations.

These techniques have helped to bring about a number of positive outcomes, including:

- an increase in customer satisfaction from 72 per cent to 96 per cent;
- new email and online forms customers can use to make comments 24/7;
- the clearer signage of services and staff at customer access points to make it quicker and easier to access specific services;
- the reduction in the average waiting time for major housing adaptations from 183 to 52 days from identified process improvements.

### **Redbridge i**

[www.redbridge.gov.uk](http://www.redbridge.gov.uk) allows citizens to customise the council website to suit their own requirements and has interactive elements enabling them to engage with the council and their community. Redbridge has benefited from more transactions being completed online rather than through other more expensive channels and it has provided a rich source of information about service users and their preferences.

### **social media**

Councils are increasingly using tools such as blogs or discussion forums and social networking sites like Facebook to supplement other forms of consultation and to engage with people who prefer to communicate online.

### **usability testing and website analysis**

Assessing systems and websites from the perspective of the customer can help you to identify where they are letting the customer down, even if they fulfil technical requirements. Website visitor statistics also provide a source of data about service use and channel preference that can be fed into insight analysis.

### **The London Borough of Barnet**

is combining traditional consultation techniques, customer segmentation models and newer social media tools to develop a rounded picture of the aspirations and needs of local people. Public meetings held by the council leader are followed up with a video posted on YouTube and transcript at <http://leaderlistens.com>, which allows those not able to attend to participate and be involved in the debate after the event. Blogs about local issues and posts in local discussion forums are monitored and engaged with. The council's presence on social networking sites like Facebook and Twitter has helped them to reach out and understand the concerns of residents young and old in a way which complements existing empowerment strategies.

## internal sources and repositories of data

In general, councils and their partners have relatively large amounts of data already available, with the main challenge being to combine and use this data to inform decisions.

### local information systems (LIS)

An LIS brings together information from different partners and other sources of data like the census to provide a repository of local information that can be used to inform policy and decision-making.

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**More? See:** *Local Information Systems: A review of their role, characteristics and benefits (CLG)*

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### front-line and customer service staff

Staff are a key source of information on citizens, customers and their preferences and concerns. Holding interviews and workshops with staff during a project helps to capture their views and experiences.

### councillors

Members engage with their communities on a daily basis and as a result have insights into who lives in their area, their preferences and where services are not meeting their needs.

## customer relationship management (CRM) systems

CRMs are an increasingly common source of information about customers and their contact with the council. The more services the CRM system covers, the more powerful this data source can be. The key challenge however is avoiding duplication of customers and their addresses to preserve the 'single view' of each customer. Even councils that do not have a full CRM system will often have some form of customer contact system or a complaints management system which can provide valuable sources of customer data.

### service area data

Individual service areas hold information and data about customers, including transaction records which can be combined with other sources of data to gain a rich understanding of service users.

### The West London Alliance

(WLA) is conducting a joint website analysis project to map customers' experiences as they use the web to access a number of council services. A number of the WLA's websites have been improved as a result of this project, including for:

- paying council tax;
- reporting anti-social behaviour;
- finding information on home care.

**The Enfield Observatory** was created over four years ago and was one of the first LIS. It is run by a team of over three FTEs and is used across the strategic partnership, with the majority of partners contributing to funding. The LIS has been used as an evidence base for many strategic decisions including the allocation of resources to meet the LAA target 'Every child really does matter'.

### external sources and repositories of data

Data sets either from government or private sector sources can provide good base information about your population. Combining these with internally-generated customer intelligence can help to form a rich understanding of your community.

- **Office for National Statistics (ONS)** for information on population, demographics, including neighbourhood-level statistics.
- **Externally purchased data** such as MOSAIC or ACORN can provide detailed population information often used to inform segmentation.
- **Neighbourhood data:** refer to Communities and Local Government's (CLG) *Practical Guides for Using Neighbourhood-Level Data* for a list of neighbourhood-level datasets.

**Chorley Borough Council** has integrated its CRM and GIS systems to build up neighbourhood profiles, to better understand the needs of its seven neighbourhoods. A customer's request or complaint can be mapped and then linked to a customer segment, to help build up a full understanding of service needs for each group. This information will underpin specific neighbourhood action plans that identify the service package needed by each group and the most effective delivery channels.

**Kent County Council** combined consultation data with segmentation analysis to identify which of its customer groups have high demand for children's daycare and where they are located within the county. This information was then used to inform resource allocation for daycare providers to target funding towards high demand areas.

## 9. looking for more information or support?

There are increasing numbers of people and agencies with an interest in supporting the development of customer insight which you may like to contact for more information:

- the **LGA** and **IDeA** have produced a host of guidance on different aspects of customer insight including the specific tools mentioned above. The IDeA also hosts the Communities of Practice website which has included an online conference and continues to discuss and publish best practice and guidance on customer insight. The front office shared service project also published *Developing Customer Insight* (2008) which gives a useful introduction to customer insight. More information at [www.lga.gov.uk](http://www.lga.gov.uk) and [www.idea.gov.uk](http://www.idea.gov.uk)

- **Local Government Customer Insight Forum:** the forum promotes work on local service transformation and insight development, and acts as a link to central government. It is a sub-group of the Local Government Delivery Council. The forum is chaired by Donna Hall, chief executive of Chorley Borough Council, and has representatives from all English regions, and from a range of different types and sizes of council. More information can be found at [www.idea.gov.uk](http://www.idea.gov.uk);

- your **Regional Improvement and Efficiency Partnerships** may have projects or programmes which can provide support and advice;

- the **Cabinet Office** has a central unit to develop and promote customer insight in the public sector and also hosts the government-wide Customer Insight Forum. The Cabinet Office has also produced *Customer Insight in public services – a primer* (Cabinet Office, October 2006) which provides some more detailed information on different aspects of customer insight. More information at [www.cabinetoffice.gov.uk](http://www.cabinetoffice.gov.uk)

- **The Information Commissioners Office** publishes a range of guidance around data protection and in particular on:

- Data sharing between different local government departments: [http://www.ico.gov.uk/upload/documents/library/data\\_protection/practical\\_application/local\\_authorities\\_-\\_data\\_sharing001.pdf](http://www.ico.gov.uk/upload/documents/library/data_protection/practical_application/local_authorities_-_data_sharing001.pdf)

- Framework code of practice for sharing personal information [http://www.ico.gov.uk/upload/documents/library/data\\_protection/detailed\\_specialist\\_guides/pinfo-framework.pdf](http://www.ico.gov.uk/upload/documents/library/data_protection/detailed_specialist_guides/pinfo-framework.pdf)

- Privacy impact assessment guidance [http://www.ico.gov.uk/upload/documents/pia\\_handbook\\_html/html/1-intro.html](http://www.ico.gov.uk/upload/documents/pia_handbook_html/html/1-intro.html)

- [www.ico.gov.uk](http://www.ico.gov.uk)

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**Local Government Association**

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The LGA group comprises the LGA and five partner  
organisations which work together to support, promote  
and improve local government.



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