

# The Customer Insight Forum

## Summary Overview

# Background: the role of customer insight

- The need to be 'customer-focused' is now widely accepted, driven by rising customer expectations and the need to design services which meet the needs of a broad population
- Customer insight is still a new discipline for government and is often misunderstood, its definition limited by people's experience and areas of comfort
- The Delivery Council / Varney Review have requested input on *"how to embed the voice of the customer in the way services are designed and delivered."*


*Deep insight into customer needs, behaviours and motivations, plus the ability for citizens and businesses to have better information on the services on offer, are all important for the design of public services that support the Government's desired policy outcomes.*  
Sir David Varney, Service Transformation Review, December 2006

# What is 'customer insight'?


- 'Insight' means different things to different people
- The term is used all the time in reference to 'interesting bits of information'
- It is not necessarily clear how to recognise strong insight from weak
- It is useful to draw a distinction between *an insight* and Insight as a *discipline*:

A customer-focused organisation has customer insight and orientation embedded throughout

## Customer Insights (1)

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- "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."
  - May be delivered by a single piece of research or ad-hoc project

## Customer Insight (the discipline) (2)

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- "Having a deep, embedded knowledge of the customers and the market around us that helps structure thinking and sound decision making"
  - Comes from a combination of multiple pieces of data, built into a joined-up "big picture" through strategic, business and political analysis

Source: (1) Sir David Varney's Review of Service Transformation and Government Communications Network: Engage Programme  
(2) Will, S. "The management and communication of customer insight", Interactive Marketing, April/June 2005

# The Customer Insight Forum

- Established under the *Transformational Government* strategy, the Customer Insight Forum will play a more formal and active role through the CSR period, supporting the culture change needed to create more customer focused services.
- The Forum will provide oversight across the public sector on all matters relating to customer insight, with a primary focus on the development of customer insight capabilities in departments and public sector organisations: bringing the true voice of citizens and businesses into the way in which services are designed, delivered and enhanced over time.
- Specifically, the Forum's responsibilities include:
  - Leading, and being seen to lead, customer insight thinking in the public sector, including providing professional advice and guidance on policy-related matters;
  - Building the public sector customer insight capability and creating a network of professionals in Government
  - Providing timely and relevant insight to inform major cross-cutting policy issues or delivery initiatives



# Role of Members

**The Forum functions as a self-empowered team, in which individuals:**

- **Spread good practice in the generation and application of customer insight and share information and learning on key customer-facing issues and trends**
- **Act as a resource to inform major cross-Government policy issues or delivery initiatives by the provision of targeted, timely insight**
- **Contribute to the implementation of Service Transformation across government on insight issues, particularly in cross cutting areas, and personally champion these in their own organisations and wider areas of influence**
- **Explore closer working relationships with users and their representative bodies to ensure effective user engagement**



# Operating Model

- The Forum reports to, and takes its remit from, the Delivery Council
- Chaired by John Mayhead, non executive at Department for Transport and member of the Delivery Council
- Secretariat provided by Transformational Government team in Cabinet Office
- Members expected to reach a collective view on key topics / recommendations
- Forum members take collective responsibility for communicating Forum objectives to staff, customers and other stakeholders
- Links via members to the Business Insight Forum, GCN's *Engage* programme, the Sharing Research group and the Contact Council

**Working in parallel with the Contact Council and Customer Group Directors, the Customer Insight Forum will provide both the formal structure and departmental resource to focus, in an unprecedented way, upon the needs of citizens and businesses, and to drive customer-centred public sector transformation.**

# Current Forum Representation

- Department for Work and Pensions
  - Department for Children, Schools and Families
  - HM Revenue and Customs
  - Department of Health
  - Department of Transport
  - Communities and Local Government
  - Central Office of Information / Directgov
  - Businesslink
  - Ministry of Justice
  - Home Office
  - Cabinet Office
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- ❖ A counterpart Business Insight Forum has been established as a special interest group linked to the Customer Insight Forum through its chair, Paul Eaves, HMRC.
  - ❖ A Local Government Customer Insight Forum is proposed.



# Annex A: Customer Insight Forum Deliverables

## 2007-08: Status as at 16<sup>th</sup> October 2007

Deliverable	Terms of reference	Status (RAG)	Accountability / sub group	Timescale for delivery
Cross-government guidance on measuring customer satisfaction	<ul style="list-style-type: none"> <li>Spreading best practice</li> </ul>	Work in progress with BMRB/Henley	CO (lead) DfT, COI, DWP	October 07
	<ul style="list-style-type: none"> <li>Supporting implementation of Service Transformation delivery plan</li> </ul>			
Cross-government guidance on customer journey mapping	<ul style="list-style-type: none"> <li>Spreading best practice</li> </ul>	Contract awarded to Oxford Strategic Marketing	CO (lead) HMRC, HO	Late Nov 07
	<ul style="list-style-type: none"> <li>Supporting implementation of Service Transformation delivery plan</li> </ul>			
Collaborative research on information needs when making complex decisions about public services	<ul style="list-style-type: none"> <li>Informing cross-government policy issues</li> </ul>	Final stages. Debrief complete.	DH, DCSF, IDeA	October 07
Collaborative research or literature review on attitudes to sharing personal data	<ul style="list-style-type: none"> <li>Informing cross-government policy issues</li> </ul>	Not started Agreeing sponsors	MOJ, DfT, other?? ...	TBA
Summary of cross-departmental mechanisms for engagement	<ul style="list-style-type: none"> <li>Supporting implementation of Service Transformation delivery plan</li> </ul>	Input requested from CIF	CO	October 07

# Annex A: Customer Insight Forum Deliverables 2007-08: Status as at 16<sup>th</sup> October 2007.. cont'd

Deliverable	Terms of reference	Status	Accountability / sub group	Timescale for delivery
Audit of departmental service design methodologies / insight capabilities	<ul style="list-style-type: none"> <li>Spreading best practice</li> </ul>	Not started (although discussed with Capability Review team) Resource issue	TBA (CO led)	December 07 / January 08
	<ul style="list-style-type: none"> <li>Supporting implementation of Service Transformation delivery plan</li> </ul>			
Summary of showcase customer insight activity	<ul style="list-style-type: none"> <li>Spreading best practice</li> </ul>	Input received from CIF members. Master summary collated.	TBA (CO led)	Ongoing
External speaker series, including - Jeremy Oates, Accenture on Leadership in Customer Service - Anne Deering, AT Kearney on Customer Service and integrated channel management - Professor Merlin Stone	<ul style="list-style-type: none"> <li>Spreading best practice</li> </ul>	Underway: 1 <sup>st</sup> event 26 <sup>th</sup> Sept; 2 <sup>nd</sup> event 31 <sup>st</sup> October.	CO	Ongoing
Establish closer working relationship with Contact Council and initiate collaborate projects	<ul style="list-style-type: none"> <li>Supporting implementation of Service Transformation delivery plan</li> </ul>	Initial conversations held with CC Chair	CO	Late 07?
Deliverable	Terms of reference	Status	Accountability / sub group	Timescale for delivery

# Annex A: Customer Insight Forum Deliverables 2007-08: Status as at 16<sup>th</sup> October 2007.. cont'd

Deliverable	Terms of reference	Status	Accountability / sub group	Timescale for delivery
Cross government customer journey mapping work (consistent with forthcoming guidance) as part of Service Transformation implementation	<ul style="list-style-type: none"> <li>Supporting implementation of Service Transformation delivery plan</li> </ul>	Not started. Should be led by departments – not by CIF?	TBA (CO led)	TBA
Annual Report summarising citizens' views of dealing with gov, channel preference etc. with operational data via contact council (incl. calls, letters and web stats)	<ul style="list-style-type: none"> <li>Supporting implementation of Service Transformation delivery plan</li> </ul>	Not started. Needs to be scoped and defined.	TBA (CO led)	TBA
<i>Establish closer collaboration with Civil Service Skills Group and National School for Government</i>	<ul style="list-style-type: none"> <li><i>Establish the training requirements for achieving competence in Customer Insight for public sector service providers</i></li> </ul>	<i>Initial conversations held Resource issue</i>	CO	TBC

# Annex C: What does success look like?

- A common language exists for customer insight across government with shared understanding of its role and uses
- Government departments, local government organisations and agencies have established customer insight capabilities operating which conform to the principles set out by CIF
- CIF guidance is widely referenced across government and is used to track performance of service transformation initiatives
- CIF is perceived as a centre of excellence and source of expertise in matters relating to customer insight
- CIF members individually and collectively inspire and support cross-government initiatives under the Service Transformation agenda

Feedback from customers via a range of sources tells us that citizens and businesses are getting services which meet their needs