Performance Management Framework

Measuring Customer Experience

Reference Guide

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Contact

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Measuring customer experience

Many agencies use customer satisfaction or customer experience surveys to capture feedback on the appropriateness, equity, efficiency, and effectiveness of their services as well as to inform service standards reported in the *Service Delivery Statements* (SDS).

Reporting customer[1] satisfaction or experience is just one method, along with other quantitative and qualitative methods that can be used to collect evidence about a service. Given that customer satisfaction or experience surveys are already in use, and business areas across government have differing resources available for customer satisfaction or experience research, it is not recommended that a standard methodology is imposed, however, better practice approaches should be followed.

This next section describes some common principles, methods and considerations that apply to both customer satisfaction and experience. The distinction between satisfaction and experience is described in more detail later in this guide.

Principles for measuring customer satisfaction and experience

When setting out to measure customer satisfaction or experience, start by considering the different experience levels of a service – ideally you should look to obtain feedback at all stages of the customer experience to gain a holistic view of how the service is performing:

- Interaction level: These are the individual interactions a customer may have throughout their journey to obtain an outcome using your service (e.g., searching online for information, a phone call to a call centre, completing an application form online).

- Journey level: This is the end-to-end process a customer goes through – from when they first make contact, to the point where they receive an outcome or obtain the desired benefits (i.e., the combination of all individual interactions).

- Relationship level: At a broader level, this looks at the relationship a customer has with the service provider, potentially across several services (e.g., an agency or business unit). Try to find a balance between qualitative and quantitative measurements by combining feedback from actual people interacting with your solution that you gather by doing further research and testing sessions, and data about performance (e.g. operational data, online analytics).

Once you have identified which experience level you are seeking to measure, you can focus on the aspects that are the most critical to the service success and begin to consider questions to pose to customers, clients or stakeholders.

For further information on designing survey questions for measuring customer experience or satisfaction, please contact the Queensland Government Statistician's Office via (07) 3035 6421 or by email at govstat@treasury.qld.gov.au.

Method

Customer satisfaction or experience can be measured using a range of quantitative and qualitative methods. Quantitative methods are measures of values or counts. With appropriate statistical design and analysis, they can be used to generalise results to represent entire populations of interest.

Quantitative methods may include:

- self-completion surveys (e.g., online, email, SMS, mail)

- interviewer-based surveys (e.g., computer assisted telephone interviewing, face-to-face intercept surveys)

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[1] Customer is defined as a person or organisation that receives a service. Note that a customer can be internal or external to the agency. Synonyms include: client, consumer, end user, retailer, beneficiary and purchaser.

- web analytics platforms (e.g., Google Analytics)

- combining methods (e.g., both administrative data and survey data sources).

Qualitative methods are generally exploratory in nature, providing valuable insights into underlying reasons and motivations of customers. However, they are generally not intended to be representative of the entire population of interest. Qualitative methods may include:

- focus groups and group discussions

- structured or unstructured observation

- in-depth interviewing.

Dimensions of satisfaction

A focus on one overall satisfaction score (whether 'rolled up' from several measures or reported from one single question) has been shown in many cases to be difficult to understand and interpret. This is largely due to there being a number of factors that can impact on the overall score, meaning that over time it is difficult to identify any changes in specific scores. For example, over a period of two years, changes to 'timeliness' have improved an area of the business but at the same time there has been a fall in the ratings of satisfaction with the staff – on balance, overall satisfaction has stayed the same over two years.

In addition, it also appears to be the case (particularly for government authorities) that customers answer the overall satisfaction question in a different way to those questions which are focused on specific service / product deliverables. For example, the UK Best Value Performance Indicator's (BVPI) surveying (research that was undertaken by every local authority on a three year cycle from the late 90's until 2007) regularly reported results that showed big changes in specific local authority scores on the services they delivered, however, the overall satisfaction scores tended towards a middling score of between 50 per cent and 60 per cent, and did not shift particularly from original benchmarks.

While it is adequate to report overall satisfaction in the SDS, internal reporting of satisfaction should be undertaken across multiple components of satisfaction so that there is some indication of the factors impacting on the overall satisfaction score on a year-by-year basis. Satisfaction based survey questions should therefore focus on revealing the specific aspects of a service that are underperforming to inform what improvements are needed.

Reporting using a five point satisfaction scale

It is intended that the new baselines created by the introduction of the measures outlined will be reported on a five point satisfaction scale, where 1 is the lowest score and 5 is the highest. The level of satisfaction reported should **include the top two measures of satisfaction only** (scores for 4 and 5 combined). They should **not** include the mid-point score (of 3).

Some agencies have previously reported a combined score of 3, 4 and 5, however, the mid-point score of 3 should not be reported as a measure of satisfaction because:

- although it can be interpreted that a respondent who has selected a mid-point score has not stated that they are dissatisfied, it is also the case that they have not stated that they are satisfied

- a mid-point score, whether explicitly stated as 'neutral' / 'neither satisfied nor dissatisfied' or not, is a legitimate opinion that exists among respondents. For example, it is fair to say that there are times when you do not feel (for whatever reason) that you are either positive or negative about a certain situation and would therefore class yourself as 'somewhere in the middle'. The market research industry generally believes this to be a fair response – and one that is different from 'don't know'.

- It may be useful to include an option such as "do not know" or "not applicable/prefer not to say." This option can help to understand survey results, as missing data can be difficult to interpret.

Common satisfaction / experience examples

Agencies commonly use the following themes and questions to measure customer satisfaction and experience about their services. Note that words such as 'timeliness', 'quality', 'ease of access' and 'outcome' are likely to have meanings that vary from agency to agency and from service to service. Consider what these general words mean in the context of the agency's business and give definitions to guide the customer's thinking about how they will answer the questions.

Theme	Recommended question type/scale	Recommended question: On a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied, how satisfied are you …
Timeliness	Rate delivery of services 'within agreed timeframes'– to allow flexibility among business areas depending on their service level agreements.	*… with the timeliness of the service?* *… with the support being provided within agreed timelines?*
Ease of Access	Provide feedback on service delivery channels (i.e., phone, online, in person etc.) and channel preferences. • the service information was clear and understandable. • it was easy to access information about the service. • it was easy to access the service.	*… that it was easy to access the service?*
Staff	Rate staff characteristics: • knowledgeable • communicate well • reliable • understands the needs of the customer / problem-solving • empathetic • I felt listened to • staff used language I can understand	*… with the way the service was provided by staff?*
Quality	Rate the quality of service based on the statements: • is a body that I can trust • provides good value services • is accountable for its services • other quality dimensions that may be relevant: expertise, competence, credible, dependable, accurate, reliable.	*… with the quality of service?* *… with the quality of the information provided?*
Outcome	Rate: • satisfactory outcomes achieved • met business requirements. Note when the service being measured relates to policy advice, measuring outcomes is not recommended as the recipient may not be satisfied with the	*… with the outcome you achieved?*

Theme	Recommended question type/scale	Recommended question: On a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied, how satisfied are you …
	outcome of the advice, but can still appreciate that the quality is high. Also, the outcome is somewhat tied up in the overall satisfaction rating.	
Overall Satisfaction	On a scale of X, how satisfied are you with the service provided by XYZ?	*Overall, how satisfied are you with the service provided?* *Based on your assessment, please indicate your overall level of satisfaction with the support provided to achieve your outcomes?*

As well as rating scales, it might be useful to collect comments from respondents. This can help understand how respondents interpreted the question, what is important to them, and to identify barriers, frustrations and pain points that the service could address.

Using complementary questions

It is expected that the surveying tool developed would include questions around service delivery improvement and other issues that are relevant to the service to allow for a greater level of analysis at business area level.

Theme	Recommended question type/scale	Recommended question:
Service delivery improvement (qualitative response – no scoring)	Feedback: • improvements to service delivery processes • improvements to access • improvements to service response standards • improvements to service quality standards.	*Do you have any ideas to improve the quality, access, response or delivery processes of this service?*

When this approach is applied by different business areas across a whole agency, it may give some indication as to what is affecting the overall satisfaction score of all business areas and if there are broader agency issues with a particular theme that need to be investigated in more detail.

Challenges of using satisfaction questions

While satisfaction measures are often used to attempt to measure the level of contentment with a service, they are limited in their usefulness.

➔ They usually don't adequately describe whether customer needs were met or what aspects of their experience with a service could be improved.

➔ Questions often complicate or combine multiple concepts. There are many examples of surveys where high satisfaction scores have been found to be associated with very low quality services (based on objective criteria, or by comparison with other, similar services). This could be due to an expectation of low quality service based on prior knowledge or experience or other influences. The result is that changes in measures over time will be difficult to see, if they occur.

➔ Questions often give no specific guidance about how the service might be improved.

➔ Questions often have an emotional component and a high cognitive load for customers. For example, a question such as 'rate your satisfaction with the politeness of the officer' requires that the customer consider both how polite the person was, and how satisfied they were with that level of politeness. A customer may say they were satisfied, even if the officer was not polite, but in this circumstance it didn't matter to the customer. In this instance, it would not be possible to identify that politeness is an area that could be improved.

In general terms, prior experiences and biases can influence satisfaction. People tend to associate their satisfaction with the service based on their prior expectations for the service. Expectations are highly subjective to the individual, as are satisfaction results. For example, customers who have frequent interaction with government services will usually have a higher expectation of a service. Biases must also be considered when measuring satisfaction. An "anti-public sector" bias among customers will influence satisfaction ratings with government services.   Additionally, where customers are being asked about wages, working conditions, complaints or taxes, etc., the outcome of the service and whether they perceived it as positive, negative, fair or undeserved will usually define the customer's overall satisfaction with the service.

Alternative measures to satisfaction

In light of the challenges of measuring satisfaction, it is worth considering the following alternative measures that may better inform an agency's ability to modify and prioritise its service delivery and/or customer expectations.

Understand customer knowledge and prior experiences (this is an optional but helpful set of questions to understand drivers of current experiences):

- What do customers know about the service?
- What aspects of the services have customers used?
- When did customers last use aspects of the service?
- How often do customers use aspects of the service?
- Have customers used similar services before or elsewhere?

Understand and measure what customers value about the service by rating importance of service attributes such as:

- access to the service was available when needed
- access to the service was available in a suitable mode (e.g. face-to-face, online)
- service was provided within a stated or expected timeframe
- information provided answered the query.

The concept of understanding what is important to customers enables agencies to focus on the experiences that matter most. When combined with a sufficiently representative sample of responses, agencies can then focus on experiences that matter most, to most customers.

Understand and measure customer **expectations** regarding service attributes:

- When did the customer expect that the service would be available / accessible (e.g. time, day of week)?
- How did the customer expect to access the service (e.g. face-to-face, online)?
- How long did the customer expect to wait to receive the service (e.g. 1 hour, 1 day)?
- Did the customer expect the information provided would completely answer the query?

Measure and **rate the most recent experience** and extent to which needs and expectations were met – this will depend on the type and complexity of the service.

- Was the service available when the customer wanted / expected – yes/no or rate (from negative to positive)? If no or negative, why?

- Was the customer able to access the service in the mode they wanted / expected it should be available? If not, why?
- Did the customer receive a complete answer to their query in the timeframe they wanted / expected? If not, why?
- To what extent did the information answer the customer's query? If not, why?
- Rate the experience overall and with specific service attributes from negative to positive. If negative, why?

An example of a summary table of results from a customer experience survey could look like the following:

Item number	Theme	Percentage who rated the theme as 'very important' or 'essential' *	Percentage who rated the theme as 'good' or 'very good' **
1	Service available when needed	90%	80%
2	Service accessible in suitable mode	30%	30%
3	Service provided in stated / expected timeframe	40%	50%
4	Information provided answered query	90%	30%

*   *Importance scale: From a scale of 1 to 4, where 1 is not important, 2 is slightly important, 3 is very important and 4 is essential*
**   *Rating scale: From a scale of 1 to 5, where 1 is very poor, 2 is poor, 3 is neutral, 4 is good and 5 is very good*

In this example, Items 1 and 4 were most important to customers but only Item 1 was rated positively while very few customers rated Item 4 positively. An agency may give additional attention to trying to improve this area of its service.

Further Information:

For more information or advice, contact the Office of the Queensland Government Statistician's Office on telephone (07) 3035 6421 or by email at govstat@treasury.qld.gov.au.