



The People, Process & Data Connection

A Training Framework for
Customer & Service Insight Teams

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1. Overview

a. The Connection

The constant “top down” pressure on all public service providers to “*improve their understanding of the needs of citizens and users to deliver outcomes that matter to communities*” ⁽¹⁾ is tangible. Public service provider’s performance is closely measured with 198 national indicators at the last count. But how do you use this and other performance information to understand the demands of citizen’s, users and communities, learn the lessons and ensure that change happens and improvement opportunities realised? What is the connection?

Using our configurable training and support framework we will answer this question. Entitled **The People, Process and Data Connection**, we aim to bring our deep understanding of private sector market intelligence skills to similar teams within the public sector. On completion, your insight team will possess the analytical skills to collate, summarise and interpret data then highlight improvement opportunities and shape strategy. Critically they will **have the skills and influence to make change happen.**

They will connect the performance **data** to **process** improvement for the benefit of the **people.**

(1) The Audit Commissions 2007 report “Focusing on citizens, users and diverse communities”

b. Market Intelligence

The private sector is very effective in the use of market intelligence; MI. Businesses invest large sums to create effective MI teams because it is critical to their success. It ensures they are not only listening to and understanding their target markets needs, but modifying and improving their offering to the changing requirements of their markets, their clients, their “citizens”. This applies equally to public sector providers although we tend to use the term customer and service insight rather than market intelligence.

Our experience of working with market intelligence teams in many sectors has shown us that they exist to answer the following 4 questions about any market.

1. What has happened in the market so far? (**REPORTING**)
2. How has it happened? (**DIAGNOSTICS**)
3. Why has it happened? (**INSIGHTS**)
4. What will happen in future? (**FORECASTS**)

Typically teams are often good at point 1 and 2 but real value is only added when points 3 and 4 are completed equally as well. As a public service provider how effective at answering these questions are your teams?

c. Three Characteristics of Successful Insight Teams

Through our own experience and analysis we have observed that effective insight teams are most able to answer the above questions when they demonstrate the following three success characteristics:

- They fully understand the dynamics of their market.

- They possess the required analytical skills.
- They are high profile teams able to influence change within their organisation.

We have used these success characteristics as the key elements of **The People, Process and Data Connection** framework to ensure your insight team has the required skills to make effective improvements in service delivery and customer satisfaction.

2. The Three Success Characteristics

So, an effective insight team needs to not only collect and report data but to add real value it needs to provide insight and become a catalyst for change. In order to do this they need to possess the three success characteristics. **The People, Process and Data Connection** training framework can be used to design tailored training to meet your needs in all three characteristics.

a. PROCESS = Understanding Service Dynamics

In the private sector this is about identifying and comprehending the relationships between demand, supply and price and the multitude of factors that may affect this, the drivers of the market. For public service providers the same is true but different terms would be used. In public services it's about understanding the demands of citizens, communities and service users and the capabilities of service providers to meet this demand at a reasonable cost to the taxpayer.

To be specific the training framework may include subjects such as **customer journey mapping, service level audits, quantitative and qualitative analysis** and perhaps **mystery shopping**. In general our training will include whatever methodologies are appropriate to the service in question to understand its drivers.

b. DATA = Analytical Skills

Specific technical skills are required to collate, summarise & interpret data and to generate insights and forecasts from this data.

Content may include the basic concepts of **statistical thinking & data analysis, monitoring performance & trends** and **making forecasts**. We will pay particular emphasis on turning data from surveys & audits into **insights & decisions**.

c. PEOPLE = Team Skills and Influence

Now that the team understands the market and has identified the true improvement opportunities they need the skills and influence to drive a process of change. Our framework will ensure that your insight team proactively highlights the opportunities for improvements based on their insights and forecasts. Their high profile will mean that their opinions will be sought by all levels of the organisation to assist in making change happen.

Subjects covered could include **change management, facilitation skills** and **personal impact skills** amongst others.

To conclude we hope you can now start to see why we describe this framework as holistic, it concentrates on providing your team with the critical skills required to support the success characteristics of an effective insight team whose motivation is ultimately to improve the complete experience of the users of your services.

3. How We Deliver the Training Framework

We start by assigning a lead trainer to each of the three success characteristics who can deliver configured training to meet your organisation's needs. Importantly the lead trainers work together to ensure that a cohesive solution is provided.

For each of the success characteristics we will undertake the following steps;

a. Scoping

We will consult with you to identify the needs, start to define the programme and assist in an initiation process with your team.

b. Pre-Evaluation

We conduct a baseline evaluation of your team and its members. This takes the form of questionnaires and interviews in order to establish:

- Knowledge – How much do they know about the subject?
- Skills – Can they apply their knowledge?
- Attitude – Do they have the desire to utilise and improve their knowledge & skills?
- Judgement – Can they exercise judgement when faced with unfamiliar situations?

c. Specification

We will use the pre-evaluation to devise a complete training programme to develop the required skills. This will include agreeing training day content and be based on, as far as possible, your own case and project history.

d. Training Delivery

Once the specification is complete and approved we will deliver the training which will include classroom training courses. We put strong emphasis on participation and content will include a mixture of presentation, practical exercises and group discussions to impart knowledge and instil the right attitudes.

This could include applying skills learnt to a current live project or using your case history.

e. Post Training Support

We follow up each course with a facilitated group session to reinforce the skills and judgements of the team members by looking at how they have applied what they learnt from the course in their day job.

Your team will also benefit from ongoing access to the lead trainers to further support the training process either via email or make arrangements to talk by phone.

f. Post-Evaluation

At the end of the program the evaluation will be repeated as explained above. Each member will receive verbal and written feedback on their strengths and weaknesses and how to develop their skills further. Timescales for when this final evaluation will take place can be agreed during the specification stage.

4. Potential Content

As explained, each programme we deliver will be unique to the specific needs of your organisation. However, we have included the following table to give you an idea of a typical training programme.

Success Characteristics	Subject	Event	Days
Project scoping	Project Setup	Meeting	2
PROCESS = Customer service Dynamics. Total Time Allocated is 10 days	Baseline	Evaluation	1
	Customer Journey Mapping	Preparation	1
		Training	2
		Follow Up	2
	Developing Service Level Audits	Preparation	1
Training		1	
Follow Up		1	
Post-Program	Evaluation	1	
DATA = Analytical Skills. Total Time Allocated is 10 days	Baseline	Evaluation	1
	Data Analysis (Basic Level)	Preparation	1
		Training	1
		Follow Up	1
	Data Analysis (Advanced Level)	Preparation	1
Training		2	
Follow Up		2	
Post-Program	Evaluation	1	
PEOPLE = Team skills and Influence. Total Time Allocated is 13 days	Baseline	Evaluation	1
	Change Management	Preparation	1
		Training	2
		Follow Up	2
	Interpersonal Skills	Preparation	1
		Training	1
Follow Up		1	
Facilitation Skills	Preparation	1	
	Training	1	
	Follow Up	1	
Post-Program	Evaluation	1	
Total Time Allocated is 2 days	Programme review	Meeting	2

Examples of the practical, activity based nature of training may include;

- **PROCESS = Customer Service Dynamics** -Each team member will be required to complete a Customer Journey Map for their chosen service area. They will then present this to an audience ideally including non-team members, identifying the known drivers of customer satisfaction and make recommendations on performance standards. They should also

identify what dynamics are not understood at present and make recommendations on what kind of survey, audit or project would deliver such understanding.

- **DATA = Analytical Skills** - each team member will be set an exercise appropriate to their level. They will have to collate data, analyse and interpret it and then present their findings including insights and forecasts.
- **PEOPLE = Team skills and influence** - the team will be observed in three different tasks that are designed to practice their interpersonal skills, team skills and influencing skills. The tasks will be running a meeting, writing a proposal and making a presentation and will be set in the context of communicating their insights and using this to drive change towards creating service improvements in other departments. They may be simulated tasks or based on live issues. The tasks will be observed by the lead trainer so that accurate feedback is given and further practice is conducted to refine these skills.

We will also evaluate the training program itself as it proceeds. After each group session, we will ask for feedback using our standard form which allows the team members to give both numerical ratings of the sessions and written comments on what they liked and what could be improved. We will use these to monitor the quality of the training delivered and to identify actions if issues emerge.

5. Time and costs

It is always difficult to estimate a specific cost until we fully understand your needs but potentially the complete programme from “pre” to “post” evaluation could run over a three month period. Training dates, times and venues will be scheduled as early as possible so that your people can plan their work loads.

Typically the total cost for the complete programme will start from **£20,000 + VAT** but again is dependent on needs and budget.

This would include all of the following:

- Attendance at steering group setup meetings.
- Evaluation of all team members competency before and after the project.
- Preparation of all training materials.
- Delivery of all classroom training.
- Facilitation of all follow-up sessions.
- One-on-one distance coaching by phone and email.
- Management of the training programme.

Our quotation does NOT include the following:

- Value Added Tax at a rate of 15%
- Sundry expenses e.g. travel, venue costs, etc. We will not incur any additional costs without your approval.
- Payment terms which would need to be agreed in advance.

6. Ten Reasons to Choose MSC Insight?

There are many reasons why you should choose **MSC Insight** to deliver the training framework for your customer Insight team.

1. We have brought together a unique collection of skills to provide the only complete all inclusive training framework for market intelligence or insight teams.
2. No other organisation offers this holistic approach.
3. We will create an effective insight team.
4. We have identified the characteristics of successful market intelligence teams and the skills needed to become a skilled and influential team.
5. We have extensive experience of working with market intelligence teams in many sectors.
6. We use our insights to add value to the training of your service insight team.
7. Courses are configurable, practical and based as far as possible on your case or project history.
8. We have experience of working with local authorities.
9. We will actively monitor the quality of the training as the program proceeds and make further adaptations as required.
10. All our consultants are highly qualified and experienced have worked together on a number of occasions to create cohesive solutions.

7. Relevant Client Examples

The list below contains examples of training, market intelligence and change management projects that we have recently completed or are still in progress. We would be happy to give the names of people in these organisations that you could contact for references.

- **International Baccalaureate Organisation (IBO)** – The IBO has recently set up a global market intelligence team in Cardiff to report on the education market and to provide insights & forecasts of future trends. We are currently providing them with an insight and forecast capability but at the same time, we are advising them on what it will take to be a high profile & influential team. An initial training course was run in November and further training will follow in 2009.
- **Children & Family Court Advisory Service (CAFCASS)** – We support the CAFCASS Outcomes team by providing an insight & forecasting capability. We analysed the initial results of a new customer feedback process which identified the key drivers of client satisfaction and has allowed CAFCASS to begin specifying performance standards for their services. In a separate project, we advised the team how to perform a survey of CAFCASS staff's workload so that they could plan and budget resources better and identify potential areas for improvement. We have also proposed a training program to enable team members to carry out these projects themselves in future.
- **High Profile Bank** – The Financial Statistics Group of this bank is primarily a reporting & diagnostic team. The bank wanted to develop the team's capability to provide insight & forecasting services and identified one of our courses as a suitable starting point. After delivering this, the team manager recommended that the course be incorporated into the bank's standard training program and this has taken place with the next course scheduled for June 2009. Unfortunately, we are not able to name the bank due to their testimonial policy, but the contract was arranged through the **Royal Statistical Society** who is happy to provide references.

- **Pfizer Pharmaceuticals** - Following two very large acquisitions, one hostile, a great deal of work was required to harmonise processes and teams across a vast international organisation. We were engaged to install a common finance/ERP system across six manufacturing sites and related administration, assist in managing such change and identify and implementing best practise. All completed on time and budget.
- **Goldman Sachs** – We designed and delivered a 6 month master class program in Team working and Influencing. This required us to manage the project at the same time. At the end of the 6 months, we conducted an in-depth evaluation of the training.
- **Bayer Pharmaceuticals** – In this program we were required to identify the competency requirements of the organisation and to ensure that these were aligned with the company's goals. We then designed and delivered a training program in Change Management and Project Management across three continents. Finally we also designed and delivered some assessment centres for recruitment of future employees.
- **Innovantage** – This Company currently provides market intelligence of the reporting & diagnostic variety on all job vacancies in the UK via its website. They have taken our advice on what is required to be a successful market intelligence provider and we are about to add an insight capability to their services.
- **Bath and North East Somerset Council**- We are currently running data quality training courses with a view to providing further training in data analysis.

8. Conclusions

If your objective is to build a cohesive and effective insight team who can collate data, generate insights from the data, map out your customer's journey, understand the processes by which services are delivered and then have the skills and influence to drive improvement and change?

Then **the People, Process and Data Connection** training framework is designed specifically to achieve this objective and much more.

It is a tailorable training and support programme to ensure your insight team/market intelligence teams understand the dynamics of their markets, possess the analytical skills to collate, summarise and interpret data and then highlight improvement opportunities and shape strategy whilst, critically, **having the skills and influence to make change happen.**

Thank you for your interest, we look forward to an opportunity to discuss your specific needs.

With very best regards from the team at

MSC Insight