

Development of a customer experience metric for contracted employment provision

by Victoria Campbell-Hall, Alice Coulter,
Nick Howat and Lucy Joyce

Department for Work and Pensions

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A report of research carried out by BMRB Qualitative and BMRB Quantitative on behalf of the Department for Work and Pensions

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Glossary of terms

Adviser	Main point of contact typically allocated to customers within a contracted employment provider.
Contracted employment provision	Public employment support contracted out to external organisations, including private companies and third sector or voluntary organisations.
Customer	Term used to describe benefit recipients who attend Jobcentre Plus or a contracted employment provider.
Employment Zone	Intensive and long-term interventions for people in particularly disadvantaged labour markets.
Jobcentre Plus	Government agency supporting unemployed people into work.
Metric	A system of measurement for quantitatively and periodically measuring or assessing a person, process, event or organisation.
New Deal	Programme to help unemployed people find employment.
Provider	External organisation contracted by the Department for Work and Pensions to provide employment support.
Star Rating	Overall rating given to a provider based on their performance, quality and contract compliance.

List of abbreviations

APACS	Assessments of Policing and Community Safety
BMRB	British Market Research Bureau
BVPI	Best Value Performance Indicator
CLG	Communities and Local Government
DWP	Department for Work and Pensions
FND	Flexible New Deal
IPS	Identity and Passport Service
IQCS	Interviews Quality Control Scheme
IWS	In-work statements
LSC	Learning and Skills Council
ND25+	New Deal twenty-five plus
ND50+	New Deal fifty plus
NHS	National Health Service
NDYP	New Deal for Young People
NDLP	New Deal for Lone Parents
NDDP	New Deal for Disabled People

Summary

The British Market Research Bureau (BMRB) were commissioned by the Department for Work and Pensions (DWP) to research factors affecting customer satisfaction with contracted employment provision. The purpose was to inform the development of a 'customer metric' to measure customer satisfaction with performance and provide a basis for customer choice between providers.

A key element of the DWP 2008 Commissioning Strategy is the move to 'a single, integrated, shared and transparent approach to the measurement and management of provider performance that enables 'like-to-like' analysis of performance'¹. To support this, a performance management system was developed for contracted employment provision, according to which a 'Star Rating' system² provides a single approach to measuring performance. The aim is for this to be accompanied by a customer experience score to enable comparison of performance in terms of customer satisfaction. The strategy pledges to 'explore what customers' expectations are in relation to contracted employment provision' and use a measure of customer experience to assess provider performance³. This research fulfils that pledge, and will make recommendations for ongoing measurement of customer experience.

The research outlined in this report consisted of three stages:

- A **scoping exercise** to gather evidence via desk research and stakeholder interviews on the proposed model of provision and the use of customer metrics or similar models.
- **Exploratory qualitative research** using face-to-face depth interviews with customers to identify what they see as being the key aspects of provision.

¹ Department for Work and Pensions (2008). *DWP Commissioning Strategy*, p25.

² For further information see <http://www.dwp.gov.uk/supplying-dwp/what-we-buy/welfare-to-work-services/star-rating-system/>

³ Department for Work and Pensions (2008), *DWP Commissioning Strategy*, p29.

- A **testing phase** with further qualitative research with customers, provider staff and key stakeholders, via a series of workshops and focus groups, to refine and 'test out' the findings from Stage Two.

Scoping exercise

The scoping exercise was conducted to better understand the issues around the development of a customer metric and to prepare the research tools for the qualitative research. A literature review was undertaken which identified the four key stages in the development of customer metrics:

- 1 Identify key drivers;
- 2 Convert key drivers into metrics;
- 3 Convert metrics into survey questions for use in monitoring; and
- 4 Review survey findings as part of performance measurement.

In parallel with this, site visits with providers were conducted which helped to define the customer journey from a provider point of view and also identify what they believed to be the key factors for customer satisfaction.

Qualitative research with customers and key stakeholders

Qualitative research was conducted with customers in summer 2009. The descriptors identified by customers were broad and had multiple meanings; therefore each descriptor was broken down into constituent elements in order to capture more specific aspects. Although there was general agreement of the importance of these elements, variations emerged between different customer groups which are discussed in more detail in the report. The set of key descriptors and their constitutive elements were as follows:

- **Adviser relationship:** catering to individual needs; continuity of adviser; mutual collaboration and support; and clear communication.
- **Adviser knowledge:** employment knowledge; careers advice; and wider knowledge.
- **Job opportunities:** quality and suitability; sustainability; range; and up-to-date.
- **Skills development:** training to increase vocational skills; to increase confidence and social skills; formal training leading to a qualification; training in basic skills such as language courses; and work placements.
- **Financial support:** expenses including travel costs, free stamps, clothes for interviews and other relevant costs.
- **Location of provider and job opportunities:** accessibility of provider; and location of employment opportunities.

- **Facilities for job searching:** sufficient facilities for conducting job searches, including computers, telephones, and easily accessible job searching such as job folders.
- **Premises:** welcoming, relaxed environment; clean and hygienic offices.

However, reporting the data on eight items back to customers was felt to be impractical and potentially confusing, and would not facilitate a simple, easy to use comparison between providers, which was one of the key objectives. Thus, it was decided to refine the descriptors to four in order to develop a shorter, more functional metrics, while maintaining coverage of a range of customer needs. Despite differences between different customer groups, it was possible to identify a sub-set which would achieve this:

- **Adviser relationship.**
- **Adviser knowledge.**
- **Job opportunities.**
- **Skills development.**

These four descriptors could be used as a base for developing a practical customer metrics to measure customer satisfaction with contracted employment provision. The descriptors align to some extent with the Department's Customer Insight Key Drivers – ease of access, treatment, timely response and outcome – but reflect the specific needs of customers of contracted employment provision.

Practical considerations

Customers' views about the suitability of various survey methods are outlined below.

Postal – flexibility of being able to fill in own time, however, difficulty of ensuring high response rates. **Face-to-face** – least effort for the respondent, however, potentially costly and time consuming and may not be feasible. **Telephone** – ease of response. **Online** – generally viewed positively, although potential problems were identified regarding a lack of IT resource and a lack of IT skills.

Customers expressed a view that there was a need to incentivise participation in the survey, however, it is important to note that customers were taking part in an incentivised research interview and had therefore been exposed to this option.

Customers felt that it would be best to conduct the survey towards the end of the provision to ensure a more informed opinion. Another suggestion was that it could be completed twice – once in the middle and once towards the end of the process to assess how views had changed. Providers favoured having it at the end due to concerns about initial resistance and negativity from new starters.

It was felt that each provider should have a **leaflet** with information about their services and programme. This should be attractive, colourful and interesting, as well as clear and easy to understand. Verbatim comments from previous customers outlining their experiences and views should be included. The **Star Rating** was viewed favourably as it would be useful when making a decision.

Next steps

The next stage of the research will take the four key descriptors from the qualitative research and adapt them for use in a quantitative survey. This will involve a period of questionnaire development, including cognitive testing. Once the questionnaire has been developed there will then be a pilot survey to test fieldwork procedures and likely response rates. Finally, a set of recommendations will be made which set out the optimal design for the ongoing measurement of customer experience of contracted employment provision.

1 Introduction

The British Market Research Bureau (BMRB) were commissioned by the Department for Work and Pensions (DWP) to undertake research into factors affecting customer experience of contracted employment provision. The purpose of the research was to inform the development of a 'customer metric', which would measure provider performance and provide a basis for customer choice between providers.

1.1 Policy context

A key element of DWP's 2008 Commissioning Strategy was to work in partnership with providers via 'strategic relationships' incorporating a shared understanding and clarity about objectives, while retaining sufficient flexibility for providers to tailor their approach to the needs of the markets and customers which they serve. Through this approach, and by fostering greater contestability and competition, DWP were seeking a step change in quality, performance and value for money.⁴

To support this new framework, a performance management system was developed for contracted employment provision, according to which a 'Star Rating' system provides a single shared and transparent approach to measuring performance. Currently, the Star Rating system, which is being piloted in Employment Zones prior to roll out nationally to all contracted employment provision, is based on the performance of providers in terms of job outcomes, quality and compliance and contractor issues⁵. However, one year into the new contracts, the Star Rating system will be supplemented by a 'customer metric' to enable comparison of performance in terms of customer satisfaction with service delivery and measure the extent to which the services offered are meeting wider customer needs. In areas where customers are able to choose between providers these scores will be made available to inform their decision.

⁴ Department for Work and Pensions (2008). *DWP Commissioning Strategy*, p25.

⁵ Further information on Star Ratings is available at <http://www.dwp.gov.uk/supplying-dwp/what-we-buy/welfare-to-work-services/star-rating-system/>

1.2 Research methodology

The research consisted of four phases, an outline of which is included below:

- A **scoping exercise** to gather evidence through desk research and key stakeholder interviews on the proposed model of provision and the use of customer metrics or similar models.
- **Exploratory qualitative research** using face-to-face depth interviews with customers to identify what they see as being the key aspects of provision.
- **Testing** through further qualitative research with customers, provider staff and key stakeholders, through a series of workshops and focus groups, to refine and 'test out' the findings. Development of final questionnaire and survey procedures through a large-scale pilot exercise.
- **Ongoing measurement** of provider performance reported at individual area level.

This report covers the initial scoping study (see Appendix A for full report) and the qualitative research (exploratory and testing). These stages have informed the development of a pilot questionnaire, which measures customer experience of contracted employment provision and forms the first step towards ongoing measurement of provider performance.

1.2.1 Scoping exercise

The scoping exercise was designed to identify best practice in the development and use of customer metrics and particular issues relating to customer experience of contracted provision. It consisted of a review of existing evidence as a desk research exercise, followed by interviews and site visits with providers.

The review found that while there was no evidence on the use of metrics for employment provision, the experiences with metrics of other public services could provide a useful starting point. In particular, the experience of other organisations had identified a process for developing customer metrics:

- 1 Identify key drivers;
- 2 Convert key drivers into metrics;
- 3 Convert metrics in to survey questions for use in surveys; and
- 4 Review survey findings as part of performance measurement.

This process has formed the basis of the approach which has been followed in establishing the metrics for customer experience of contracted service provision.

The site visits, which were conducted alongside the desk research, were used to understand the customer journey through contracted provision from a provider's perspective. In addition to this, the visits also allowed the research team to explore

what providers felt drove customer satisfaction and identify potential practical problems in the administration of the ongoing customer survey. Further details on the site visits and the scoping exercise as a whole can be found in the Appendices.

1.3 Exploratory qualitative research

A qualitative approach was adopted to allow customers' views and experiences to be explored in detail. It should be noted that qualitative methods neither seek, nor allow data to be given on the numbers of customers holding a particular view nor having a particular set of experiences. The aim of qualitative research is to define and describe the range of emergent issues and explore linkages, rather than to measure their extent.

As part of the development of a customer metric, the overall aim of the qualitative research was to define a set of descriptors which could be used as a basis for measuring customer satisfaction with contracted employment provision. This research therefore sought to identify and understand the range of factors affecting customers' experience of employment provision, alongside more practical issues associated with introducing customer metrics.⁶

More specifically, the research aimed to explore:

- factors affecting customers' experience of contracted employment provision;
- information required by customers to enable informed choice between service providers; and
- the best means of conducting ongoing research with customers.

The research team were cognisant of existing knowledge about customer experience and satisfaction within the department. This included the Customer Insight Key Drivers⁷, which set out service priorities for the full range of the Department's customers, and Departmental Strategic Objective Seven⁸ which builds on the Key Drivers to outline the Department's commitment to customer service. Within this framework, the purpose of this research was to identify the most important factors for a specific subset of the Department's customers: job seekers attending contracted employment provision.

The qualitative research was conducted throughout summer 2009 in relation to two stages of the research design, outlined below.

⁶ It is important to note that this research sought to explore customers' unprompted views about key aspects of provision, and was not therefore restricted by boundaries of what providers are expected or required to provide.

⁷ http://statistics.dwp.gov.uk/asd/asd1/dsopsa/DSO7_REPORT.pdf

⁸ <http://research.dwp.gov.uk/asd/asd1/dsopsa/dso7.asp>

1.3.1 Exploratory qualitative research to identify key drivers of satisfaction

This stage of research sought to explore key drivers underpinning customer experience and satisfaction in relation to contracted employment provision. Specifically the research considered:

- key factors impacting on the experience of service provision overall, as well as a consideration of specific stages throughout the customer 'journey';
- details of the information required by customers to effectively inform choice between providers; and
- possible approaches to conducting ongoing research with customers.

The research involved 135 face-to-face depth interviews with customers across three Jobcentre Plus districts, ensuring coverage of both rural and urban districts. The sample included a spread of five key customer groups eligible for contracted employment provision on a range of programmes (based on eligibility for New Deal provision): New Deal 18-24, New Deal 25+, New Deal 50+, New Deal for Lone Parents; and New Deal for Disabled People. Secondary variables included demographics, such as gender, ethnicity and religion; and previous experience of service provision (ranging from less than four weeks to more than six months) (see Appendix B for a full breakdown of participants). Including such a broad spread of customers allowed for the inclusion of a wide range of views. Variations between these groups are specified throughout the report where relevant. Where not specified no differences were noted.

This stage of research sought to 'categorise' key aspects of customer experience and produce a set of 'descriptors' which would then be tested and refined in the subsequent stage.

1.3.2 Testing descriptors of customer satisfaction

Further qualitative research sought to build on the descriptors developed in the exploratory phase, beginning to 'test' them out with specific target groups and identify recommendations for developing practical operational metrics. The descriptors were presented to participants to explore how far they reflected wider priorities. The fieldwork was conducted in a fourth Jobcentre Plus district in order to widen the range of opinions of customers consulted and provide a further check for previous findings.

The testing stage involved:

- **Workshops with customers** – Two customer workshops were conducted, each comprising ten participants selected to reflect a range of sample variables included in the exploratory phase.

- **Mini-groups with customers** – Four mini-groups were conducted with specific customer types selected to represent the widest variations in terms of their needs and requirements for satisfaction, as highlighted from phase one findings. These included: ND18-24; ND50+; lone parents; and disabled customers.
- **Workshops with providers** – Two workshops were conducted with providers, one with managers and one with frontline advisers, to discuss the findings and draw on their extensive knowledge of customer experience and the process of service provision.
- **Roundtable workshop with key stakeholders** – A workshop was conducted to feed back key findings from the exploratory phase of research to stakeholders through a formal presentation. The experiences, views and reactions of stakeholders were also explored as part of a discussion session.

Following the two qualitative phases, eight key drivers were identified. These were then narrowed down to a **sub-set of four key descriptors** that were of relevance to almost all customers of contracted employment provision.

Verbatim quotations are used throughout the remaining chapters of this report to illustrate points made; such quotations are referenced according to relevant quota characteristics.

1.4 Report structure

Chapter 2 of this report explores the customer journey through employment provision and outlines the important factors affecting customer satisfaction. **Chapter 3** details the key descriptors that were identified in the depth interviews with customers and then tested out with both customers and other stakeholders. **Chapter 4** describes how the full list of descriptors was reduced and outlines how the final descriptors align with the Department's Customer Insight Key Drivers. Finally, **Chapter 5** explores customers' views on practical issues for the administration of the metrics survey and how best to communicate the findings and sets out the next steps for the final metrics.

2 Understanding customers' needs

This chapter firstly outlines customers' experiences of the 'journey' through employment provision. This was explored in the scoping exercise to provide context for the research and better understand factors affecting satisfaction. Secondly, it explores variations between how different customers prioritised key factors for satisfaction depending on their specific needs and their 'work readiness'.

2.1 Journey of service provision

Despite differences in service provision between the various providers involved in this research, a number of typical key stages were identified, forming distinct elements of the customer journey. Each of these stages is outlined below and includes key aspects that were found to affect customer satisfaction at that stage. These aspects are explored in greater detail in subsequent sections.

Please note that, unless specified, any reference to an 'adviser' refers to a customer's main contact within the provider rather than the customer's Jobcentre Plus adviser.

The first stage in the customer journey involved the **referral** from Jobcentre Plus to a provider. Referrals were either 'mandatory', meaning customers were obliged to attend as part of their benefit requirements following a specified period of time at Jobcentre Plus, or they were 'voluntary' with referrals being made as a result of a perceived need for support (as was the case with lone parents and disabled customers). Experiences of the referral process focused on Jobcentre Plus and were not therefore explored as part of this research. However, experiences of delays to benefit payments post-referral were found to affect customer satisfaction with providers, even in situations where these were caused by Jobcentre Plus.

The **initial meeting** with the provider typically involved an induction, either as a group or on an individual basis, sometimes referred to as a 'welcome meeting' or 'registration'. At this induction, customers were informed about the programme

and met their adviser. Aspects of this meeting which were found to have an impact on customers' initial views included: the location, accessibility and layout of the premises; and first impressions of the adviser, other staff and other customers.

Customers generally described an initial **assessment** or testing in the early stages of provision, aimed at understanding customers' needs and skills. This assessment varied in depth and format, from short questionnaires exploring customers' employment history and interests, to formal basic skills testing, and/or detailed discussions with advisers. Aspects affecting customer satisfaction with the assessment process included: customers' perceptions of their skill level and need for improvement (and therefore testing); and the clarity about how assessment results would be used by the provider.

Following assessment, many customers described developing an **action plan** in conjunction with their adviser. This outlined activities customers would need to undertake during their time with the provider, including attendance, training and job search requirements. Customers' experiences varied in relation to how these plans were developed and used during their time with the provider. These ranged from informal agreements between customers and their advisers, to more detailed plans outlining specific steps towards gaining employment. Aspects affecting customer satisfaction with the action plan included: the extent to which customers were able to feed into development of the action plan; and how action plans were subsequently used to measure progress on an ongoing basis.

Customers identified a wide variety of **vocational support** offered by providers, aimed at improving customers' employment skills. This included support from both the adviser and other tutors with job searching, training classes to improve skills, such as CV writing or interview techniques, work placements to gain experience, and review sessions to assess customer progress. Aspects affecting customer satisfaction with vocational support included: perceived need for skills development; and whether the level at which training and support was provided met customers' needs.

Customers also identified **personal support** offered by providers. In contrast to vocational support, this referred to any support given by providers that was felt to be geared towards improving customers' job readiness in a holistic, rather than vocational, sense. This would include classes to improve confidence and social skills, and advice around wider issues, such as benefits, childcare, and other support agencies. Customer satisfaction with personal support varied according to a number of issues, including: perceived need for personal support; quality of training and advice; customer preferences for format and structure of training and advice.

As the research was conducted with existing customers of contracted employment provision, customers had not experienced support around the transition into work or completion of provision with their current provider. Therefore, customers were asked about the support they would like/expect to receive during the transition into work or about their previous experience of provision. Customers were

generally aware of support available during the **transition into work**, including advice and information, ongoing contact and support from advisers, and in some cases additional financial support. And finally, as part of their **completion of support**, customers' felt that their opinions of provision would be affected by the outcome, in terms of whether they had found employment or would be returning to Jobcentre Plus, and the extent to which they felt 'better prepared' for work.

2.2 Work readiness

Variations were found between how different customers prioritised key factors for satisfaction depending on their specific needs. In particular, patterns emerged in relation to customers' perceptions of their 'work readiness'. Specifically, three customer groups were identified, with members within each group sharing broadly similar priorities for customer satisfaction. For the purposes of this research, these have been categorised as: 'work ready'; 'unprepared'; and, 'disadvantaged' customers (see Table 2.1).

Customers who considered themselves to be '**work ready**' felt they were fully prepared for conducting job searches, being interviewed and entering the workplace and therefore required less support from their provider. This group were most likely to be looking to find employment as quickly as possible. Factors that were important to this group included a good range of job opportunities and sufficient facilities for job searching.

Customers who felt they were '**unprepared**' for conducting job searches or entering the workplace, for example someone who has been out of work for a long time, required a medium level of support from their provider, such as building skills, confidence and motivation. Factors important to this group included those aimed at increasing their level of work preparedness, such as training and work placement opportunities, as well as careers advice.

Finally, customers who were identified as being '**disadvantaged**', for example through disability, exhibited special needs which made it challenging for them to find work. In most cases, these customers required a high level of support from their provider, incorporating tailored support in line with their needs. Factors important to this group included those aimed at providing additional support and increasing confidence levels, such as the adviser relationship and skills development. It was felt to be essential to have this in place before they could move onto finding suitable employment.

Table 2.1 Effect of 'work readiness' on key factors for satisfaction

	Work ready	Unprepared	Disadvantaged
Level of support	Low	Medium	High
Aim	Find employment as quickly as possible	Increase level of work readiness	Identify and address needs and barriers through tailored support
Priorities	<ul style="list-style-type: none"> • Good range of opportunities • Facilities for job searching 	<ul style="list-style-type: none"> • Training/work placements • Careers advice 	<ul style="list-style-type: none"> • Adviser relationship • Skills development

3 Key descriptors for customer satisfaction

This section explores a number of 'descriptors' identified as affecting customer satisfaction with contracted employment provision.

During the exploratory phase of the qualitative research, customers were encouraged to freely suggest factors that were important for their satisfaction. A preliminary list of key descriptors was developed from these findings, which formed the basis of discussions during the subsequent testing phase. Following the testing phase, a set of key descriptors was developed, consisting of the following:

- Adviser relationship;
- Adviser knowledge;
- Job opportunities;
- Skills development;
- Financial support;
- Location of provider and job opportunities;
- Facilities for job searching;
- Premises.

Each of these descriptors is considered in turn below.

3.1 Adviser relationship⁹

The relationship between customers and advisers was viewed as key to customer satisfaction with contracted employment provision. Building a good rapport with the advisers and developing mutual trust and respect was perceived to provide a firm base on which other aspects of provision could be built.

⁹ Please note that, unless specified, any reference to an 'adviser' refers to a customer's main contact within the provider rather than the customer's Jobcentre Plus adviser.

'If there was no relationship then you would have nothing to build on and there would be no point...If the advisers didn't build a relationship or a rapport with the customers then the whole thing would be a failure... It would become ineffective.'

(Female, customer workshop)

Successful relationships with advisers were found to improve customers' confidence and motivation levels, enabling them to engage fully with provision. This was felt to be particularly important for customers considered to be 'vulnerable' or 'challenging', such as long-term unemployed customers who described initial resentment at having to attend provision or were pessimistic about ever finding employment.

'You get your adviser in here and you get taught a lot, you get used to talking to them really, they make you feel you want to do something... You start to develop, well I wouldn't say a friendship but you start to develop more than you would at the Jobcentre.'

(Female, 18-24)

'A lot of people, they don't want to be there, you know, and I think the key is to try and find out why...and for the adviser to convince you that I know you don't want to be here but [it's for] your own benefit.'

(Male, customer workshop)

Despite these overall views, the term 'adviser relationship' was found to have multiple meanings for customers. This descriptor was therefore broken down into smaller elements to capture more specific aspects of the relationship:

- Catering to customers' **individual needs**;
- **Continuity** of advice;
- Mutual **collaboration** and support; and
- **Clear** communication.

Each of these elements is outlined below.

Catering to customers' individual needs involved tailoring the support given by advisers in line with the specific needs of individual customers. This tailoring was described as essential to making customers feel valued and respected and ensured that their needs were properly met. In particular, customers felt real appreciation when advisers showed flexibility, empathy and attempted to attend to their specific needs.

'She is sympathetic...I was in the middle of an interview and my daughter had an incident at school and I had to go and sort her out because you are only allowed an hour. I had to go and pick her up. I spoke to my mentor, I said I am sorry I can't fulfil the interview, do you mind if I go. I haven't got the money to get up there, she give me a bus ticket...This was something out the ordinary, and she let me curtail the interview and she let me go.'

(Male, 50+)

This element of the adviser relationship was perceived to be the most important for customers. It was felt that if an adviser was focused on catering to the customer's individual needs then all the other essential aspects would fall into place.

It was generally felt that **continuity of advice** improved satisfaction levels, aiding the development of a relationship and eliminating the need for customers to repeatedly explain their situation. Customers were happy to see different, specialist advisers, but wanted one advisor who had overall responsibility for them. This was especially important for those with sensitive issues, such as health problems or childcare difficulties. Customers acknowledged the importance of provider staff having specialised knowledge about employment and benefit information, although felt this could be provided alongside and separate to adviser continuity.

'Somebody can specialise in that area so then they'll know the ins and outs but no one adviser would be able to have [knowledge of all areas]...So that personal adviser will have that knowledge of you but then they should have people in place who have knowledge of the sector so they could refer to that person.'

(Male, customer workshop)

Customers valued **mutual collaboration and support** between themselves and their advisers and voiced a desire for a trusting, non-judgemental relationship, where adviser and customer worked together to find suitable employment opportunities. Active involvement in the process and having their opinions sought and acted upon boosted customers' confidence and motivation to find employment, as well as calming fears that they would be forced into taking any employment.

'She [adviser] says to me, 'they're your options...It's what you want to do'. It's like she was saying we don't want to try and find you work where you won't like it...At the end of the day they're just here in the middle to, you know, like, give you the boost to help you along.'

(Male, 25+)

Having **clear communication** in their relationship with advisers was perceived to be vital for customers to have a solid understanding of the process of provision. Where customers described receiving insufficient information about elements of provision, they felt this led to missed opportunities and unrealistic expectations. Communicating in a straightforward manner, or 'on a level' with the customer,

was also said to be important because it meant that customers felt they were getting information tailored to their situation and in a non-patronising or confusing manner.

'Yes, she did explain [about the process] and when she told you stuff she'd tell you the right way and all that, she doesn't muddle you up...straightforward, yes.'

(Male, 18-24)

3.1.1 Customer variations

Although there was general agreement of the importance of these elements, variations emerged between different customer groups. For example, 'disadvantaged' respondents, such as disabled and lone parent customers, favoured a relaxed approach, with advisers allowing them space and time to find an appropriate and sustainable job. This was in contrast to younger and more 'work ready' customers who generally favoured a more proactive approach from advisers to find work as quickly as possible.

Customers aged 50 plus emphasised the need for advisers to have a non-judgemental approach due to concerns about possible stigmatisation for being unemployed at their late stage of life. A preference was expressed for having an adviser their own age, but most recognised that this was not always possible and therefore wanted to be treated with respect by younger advisers.

3.2 Adviser knowledge

In addition to forming good relationships with advisers, customers highlighted the importance of advisers having a good knowledge of key areas relevant to employment. It was felt that advisers should have a good working knowledge of the following areas:

- **Employment** – knowledge of different employment sectors, current vacancies and best routes to identify jobs;
- **Careers advice** – offering advice, encouragement and practical skills;
- **Wider knowledge** – knowledge of related topics, including opportunities for skills development, benefits and accessing additional support.

For the most part, customers felt that it was essential for advisers to have **employment knowledge** about a variety of employment sectors, current employment vacancies and work placements available, and the best routes to identify jobs, for example through searching employment websites or vacancy databases. This knowledge was key for enabling customers to access the widest range of suitable vacancies, as well as giving them the skills to conduct their own searches.

'I'll come over and talk to her and she'll be like, 'I've got this job'... then she'll say 'I have got a website' and then she'll come over with the website and I'll try that. So [adviser] will always try and get new websites and she'll always tell me.'

(Female, lone parent)

However, customers recognised that advisers could not have detailed knowledge about all aspects of employment. Greater importance was therefore attached to advisers having some knowledge of specific areas, and then being able to signpost customers on to additional, more specialised information where necessary.

Another important knowledge area for advisers related to **careers advice** and customers highlighted the importance of advisers being able to provide practical skills advice, such as interview techniques and CV writing. Further to this, customers perceived that advisers should be skilled at motivating customers to think more creatively about employment opportunities, such as setting up their own business. It was also felt that advisers should be managing customer expectations about the length of time required to find employment and the type of employment they would be likely to find work in. For younger customers with little employment experience or those who needed to change career paths, this support was key.

[The adviser] was able to tell me what paths I needed to take. I mean my only previous jobs were through family you know, it was my family who had a fruit and veg business... I've never actually had the experience of going to an interview or anything like that, so she helped me prepare for interviews or like teach me a way of how to deal with an interview and how to build up a CV, because I've never had to do it before.'

(Female, lone parent)

And finally, it was felt that advisers should possess **wider knowledge** about employment-related topics, including accessing benefits, childcare or further training. In situations where customers discovered that their adviser had misinformed them about benefits or support that they were entitled to, this impacted negatively on their views of the adviser and provision as a whole. This was related to the previously mentioned need for facilitating access to specialised information where necessary.

3.2.1 Customer variations

Lone parents, in particular, required advice on issues such as whether they were able to access additional support with childcare, what benefits they could access when in employment, and 'better off' calculations to assess whether they would be better off in paid employment. In addition, they required advice on how to find suitable employment that would fit in with their childcare responsibilities, such as flexible or part-time work.

More generally, customers' needs and priorities for adviser knowledge differed depending on their level of 'work readiness'. Customers who felt they were ready to work emphasised the need for advisers to have strong employment knowledge,

as they were keen to get back to work quickly. In contrast, customers who felt they required more intense support from their adviser before they were ready to enter work valued other forms of adviser knowledge, such as careers advice and wider knowledge.

3.3 Job opportunities

A further factor, which was highlighted as important for customer satisfaction with contracted employment provision, related to having access to adequate job opportunities. Customers felt that the ultimate aim of provision was to find employment, which without adequate job opportunities would not be possible. However, simply having many job opportunities was not felt to be sufficient due to experiences of job opportunities being out of date, of a poor quality, or not suited to customer needs. Therefore, customers felt that providers should ensure that all job opportunities fulfill the following criteria:

- **Quality and suitability** – filtered by provider for suitability; matched to customer needs;
- **Sustainability** – opportunities that will result in long-term employment;
- **Range** – opportunities in a wide range of sectors and to suit a range of customer needs;
- **Up-to-date vacancies** (delivering on time) – regularly updated and current.

Customers were generally looking to find employment that would be enjoyable and suited to their needs, therefore having employment opportunities of a good **quality and suitability** was perceived to be key. This aspect was ultimately felt to encapsulate the other elements in this descriptor, as a good quality, 'suitable' job would automatically fulfil the other criteria. It was felt that all potential job opportunities should be filtered by advisers and matched to customer's individual skills and needs to ensure that they were applying for suitable jobs. There was a general lack of interest in applying for any work available and concerns were voiced about the possibility of being pushed into taking jobs, simply to ensure that providers reached target outcomes.

'Because like when I said I wouldn't do certain types of jobs I didn't feel pressured that I'd have to do them. You know if there's a job you really don't want to do... There's no point in being in a job that you don't like.'

(Female, 18-24)

Employment opportunities needed to be **sustainable**, resulting in long-term employment, rather than a short stint of employment and then a return to the cycle of provision. Customers were concerned that if they accepted a job that subsequently fell through, they would have to reapply for benefits and return to Jobcentre Plus. It was generally felt that there was a far greater likelihood of customers maintaining employment if it was matched to their skills and needs,

and they felt fully invested in the role, relating back to the importance of good quality and suitability of employment opportunities.

'Just because you've got no choices so you have to go for the [job] that you don't want but you should like go for, but then everyone has to change jobs all the time... You should go for the one that you're going to feel comfortable with.'

(Female, customer workshop)

Having a wide **range** of employment opportunities in a variety of sectors and to suit a range of customer needs was another key element for customer satisfaction. Experiences of searching through a fairly limited range of job opportunities prompted concerns among customers that they would be required to apply for jobs they were not interested in. This was related both to finding employment as well as ensuring that they completed their job application record forms to prove they had been applying for jobs. Customers had to demonstrate that a certain number of jobs had been applied for every week or face possible sanctions.

'I just think, oh God, if I don't have enough jobs filled out on the sheet I might get my benefits taken off.'

(Female, customer workshop)

Customers stated a need for providers to have vacancies which were current and regularly **updated**. Concerns were raised about the possibility of missing opportunities to send in early applications, and many customers had experienced the frustration of applying for jobs that had already been closed, but not taken off the system. Customers typically expressed a desire to be informed as soon as possible when a suitable job comes through, for example through being phoned or texted by their adviser, enabling them to beat the rush of applications. Given the current economic situation and the increased number of candidates applying for positions, this was viewed as key to finding employment.

'When you go, they have like a job book, like loads of jobs in it. And like some of them are from last week and you ring up and they say, "I'm sorry, it's gone".'

(Male, customer workshop)

3.3.1 Customer variations

Customers aiming to find more immediate employment, particularly customers aged 18-24, viewed the range of employment vacancies and ensuring vacancies were up-to-date as highly important. Customers described having to submit 'hundreds' of application letter before gaining an interview. Therefore, given the time limit placed on them to find a job before they had to return to Jobcentre Plus, it was viewed as essential to apply for as many jobs as possible to ensure they found a suitable position within a reasonable amount of time.

'It's about getting as many of those jobs with the hours that I require, for me to apply for and the more applications I make, the more likely I am to be seen by an employer.'

(Female, 18-24 mini-group)

Vacancies needed to be accessible and made available using a range of mediums, including paper for those who lacked technical capabilities and could not access the internet without support. In particular, customers aged 50+ valued hard copies of job opportunities or support with computer searches.

Lone parents tended to prefer job opportunities that fitted in with their parenting responsibilities, for example, working in a school so that the hours fit in with the child's school day, or having flexible hours that would allow them to organise their time around their childcare arrangements. Job searching with such specific criteria added to the difficulty of finding employment and many lone parents had found it extremely difficult to find suitable opportunities.

'I'd prefer to work in a school as my son is just going into full-time school and I want to be there for him...There's so many people that get jobs a month, well I don't think so, I've been going there for a year and it hasn't been happening.'

(Female, lone parent mini-group)

3.4 Skills development

Although important for most, for customers requiring development in one or more areas before they were ready to move into work, skills development was perceived to be key. For these customers it was essential to improve in the areas they were lacking, whether in terms of improving job searching skills, increasing confidence or building up work experience. Therefore they needed providers to offer skills development, including:

- Training to **increase vocational skills**;
- Training to **increase confidence and social skills**;
- **Formal** training leading to a qualification;
- Training in **basic skills**, such as language courses;
- Work placements to gain **work experience** and a **potential job opportunity**.

Training to **increase vocational skills** through the development of skills, such as CV writing and interview skills, was vital for customers lacking recent employment experience, such as the long-term unemployed or younger customers looking for their first position. Skills such as the ability to put together a professional CV and having well developed interview techniques needed to be learned and practised, with support from advisers and tutors. For example, customers found the mock interviews conducted with advisers particularly useful for improving confidence for actual job interviews.

Those customers who lacked confidence in their abilities and had poor social skills valued training to **increase confidence and social skills** through team-building exercises or workshops or on a one-to-one basis with their adviser. When such training was given to customers who needed improvement in this area, it was felt to be very useful both for finding employment and for improving their confidence and motivation.

'Because sometimes for a job you don't necessarily have to be skilled on that job. Like if you go for an interview, if the employer likes you, they might just employ you because they can see that you've got potential and you've got the social skills.'

(Male, customer workshop)

Customers described a lack of opportunity for **formal training** outside of basic skills training. It was felt that providers should facilitate more access to training that would result in formal qualifications, ranging from short courses to cover child care, fork lift trucks, and driving licenses, through to long-term studies. Given the state of the economy and the lack of available job opportunities, it was felt to be necessary to have something useful to fill their time and ensure that when the economic situation improved they would be in a better position to find employment having increased their skills and experience.

'Well I was, I'd like to do that care assistant, I'm interested in doing that, I would quite like training for that... They don't offer training so I didn't think there was any point in asking, but I think they should offer training to help you get a bit of experience and a bit of knowledge.'

(Female, 18-24)

For customers with minimal education or English as a second language, the training in **basic skills** was viewed as an invaluable opportunity both to improve their literacy or numeracy and to gain a qualification. An added benefit for customers was the increase in their levels of self-esteem because they no longer felt embarrassed about their lack of education or their poorly developed language skills. This in turn increased confidence when applying for jobs, as well as improving motivation.

'Before, you know, my speech wasn't really clear like I'm speaking now. When I came here they helped me with my speech and motivated me.'

(Male, 18-24)

Work placements were viewed as a good opportunity to gain valuable **work experience**, particularly for customers with minimal previous experience. More generally, customers valued placements that could potentially lead on to job opportunities, although some concerns were raised about the possibility of exploitation of the free labour. It was hoped that a work placement would provide an opportunity to show that, in spite of a lack of experience or education, customers were hardworking and could perform in the role and they would be offered a more permanent position. For those who saw little other opportunity for finding employment, this was seen as a potential lifeline.

'Because you've got like a chance to show your real colours and I think to show how you work.'

(Male, customer workshop)

3.4.1 Customer variations

Customers who lacked IT skills, particularly customers aged 50+, expressed concerns about the negative impact this had on their job searching, both in relation to accessing job search tools and ultimately finding employment. This resulted in an inability to maximise their job searching and caused feelings of frustration. They therefore identified a requirement for IT training either at the providers' offices or at a specialised training provider.

'The computer was telling me things but as I said, I am computer illiterate and I didn't understand what the computer was saying to me. I didn't know whether I was attaining the right levels when I was attending regular, I didn't know whether I was in front, behind, doing the right thing, doing the wrong thing...'

(Male, 50+)

Customers with limited experience of employment, or who wanted to change career paths, favoured having an opportunity to gain work experience through placements. This would both increase their skills and knowledge and, if they succeeded in the role, would create a reference for their CV which would impress potential employers.

'With me I would prefer the work experience because if I go up there and I am working there on work experience, I might get a lot of knowledge to write on my CV that I have been working in such and such a place.'

(Female, 18-24 mini-group)

'Disadvantaged' customers, such as long-term unemployed and disabled customers, often lacked the confidence or motivation to look for work. As a result, they tended to value training that improved confidence and motivation levels, such as team-building exercises and workshops.

3.5 Financial support

Providers offered varying levels of financial support to customers to aid their job search, ranging from minimal support, in the form of free stamps and phone calls, to more extensive support, such as travel costs, clothing vouchers and mobile phone costs. There was a general perception among customers that providers should offer some degree of financial support to assist with job searching costs, specifically in relation to:

- **Expenses** – including travel costs, free stamps, clothes for interviews and other relevant costs.

Customers highlighted the struggle they faced when attempting to cover costs related to finding employment while living on benefit payments. Travel costs were a major issue as customers were regularly required to travel to the provider, and then on top of this they had to travel to job interviews and pay for other related expenses. Therefore any additional support in this area was much appreciated, and customers valued experiences of providers covering travel costs related both to attending provision and work interviews.

'I want to go to that job there, there and there. But then the money that is spent on travelling, because not everyone can afford going on trains.'

(Female, customer workshop)

Depending on their level of previous provision experience and information from family and friends, customers had varying expectations regarding financial support available from providers and this tended to affect their satisfaction with support provided. More specifically, if financial support had not been expected, it was generally viewed positively and having someone willing to invest money in them could potentially build confidence and strengthen the relationship with the provider. However, customers with greater experience of provision and financial support, expected to receive this support and were therefore frustrated when their expectations were not met.

3.5.1 Customer variations

Lone parents identified a need for financial support for childcare costs when attending provision or job interviews as they could not otherwise afford to pay for childcare. Some parents mentioned that they had been given a month's worth of support for childcare from their provider and although this was appreciated, it was not felt to go far enough.

'You had to pay each hour to childminder, each child was £7.20 and you're sometimes, I mean where am I going to get the money for this?'

(Female, lone parents mini-group)

3.6 Location of provider and job opportunities

A further factor, put forward by customers as key for satisfaction, was the location of the provider, as well as the location of potential job opportunities. Given the difficulties mentioned above around financing travel costs on a limited budget, customers felt that providers should consider location issues, including the following:

- **Accessibility of provider** – in local area, public transport links, cover travel expenses;
- **Location of employment opportunities** – in local area, easily accessible by public transport.

The **accessibility** of the provider premises was viewed as important by customers and it was felt that ideally it should be in the local area and be easily accessible by public transport links. Being well connected by public transport and therefore easily accessible was seen as more important than being close to their home. However, the provider's location was of less importance if customers knew that travel expenses would be covered, and customers were generally willing to travel slightly further to ensure that they received professional provision, especially if they received support with the costs.

'I think that would come down to finances...If you could go with another provider but you had to travel, that's going to cost money...I mean, if that was the case then obviously I would go if that one was better and they were going to reimburse then yes definitely I would go with them.'

(Male, 25+)

The **location of employment opportunities** was also perceived to be important for customers, for similar reasons to those considered above. Therefore, customers felt that job opportunities should also be in the local area and easily accessible by public transport. However, the distance that customers felt was acceptable to travel differed quite widely, from a fifteen minute bus ride to an hour long commute.

3.6.1 Customer variations

Location of provider was said to be particularly important for customers with more specific needs, such as disabled customers and lone parents. For example, lone parents highlighted a requirement for a convenient, central location, enabling them to collect children from school or childcare. However, most of these customers were willing to travel slightly further for good support, although this had to be within reason.

'Even if you were 10 miles away...you've got to help yourself before anybody else can help you. So if you need to travel that kind of distance to get to somewhere like this I'm sure it would be worth it.'

(Male, disabled)

3.7 Facilities for job searching

Job search facilities were identified by customers as an important element of customer satisfaction, given that the primary aim of provision was to search for employment.

Customers expressed a view that provider offices should have **sufficient facilities** for conducting job searches, including computers, telephones, easily accessible job searching such job folders.

Customers appreciated having easy access to job search facilities that were not available to them at the Jobcentre. It was felt that the most essential facilities

were sufficient, good quality computers that customers could easily access. This was especially important for customers without access to computer or internet facilities at home. It was felt that providers should ensure that all customers had equal access to computers and could be supported if necessary. Experiences of old or slow IT equipment was viewed negatively by customers as it meant their job searching would be slow and frustrating.

'I mean especially with these computers. They're old, crap computers. They've been slowed down.'

(Female, 25+)

3.7.1 Customer variations

Customers who were not computer literate, typically those aged 50+, required access to hard copies of job folders for searches or IT training. As previously mentioned, this was felt to be frustrating and unfair because the vast majority of jobs were only advertised online. Unless the provider was making an effort to ensure that jobs were printed out and made available offline, these customers felt they were missing out on many potential job opportunities.

'I need to get more training...I look at boards or newspaper and computer. I've noticed I was interested in a few jobs on the Internet, NHS...but I don't know how to [apply]...stops me from applying for the job.'

(Female, 50+ mini-group)

3.8 Premises

Although not viewed as the highest priority for customer satisfaction, having a presentable, professional premises added to customer's general impression of a provider and therefore to their satisfaction. It was important that premises were functional for their needs, both in terms of finding employment and catering to more personal needs, such as disabilities.

'It is important but you have to expect that it is not going to be an all shiny and exciting place. It is a place of business and you are there to do what you need to do but obviously for what it needs to be it is a good place.'

(Male, 18-24)

In situations where the premises were felt to be below standard, affecting customers' comfort and job search ability, this factor became more important and customers were more likely feel unsatisfied. For example, one customer emphasised his dissatisfaction with a provider whose premises were felt to be unsafe.

'When I was on a two-week course, a window fell out and smashed outside and I think health and safety is important. There was all wires across the floor and people were tripping over the floor and all that.'

(Male, customer workshop)

To ensure comfort and functionality for a wider range of customers with different needs, it was felt that provider offices and facilities should include the following elements:

- **Welcoming, relaxed environment;**
- **Clean, hygienic offices;**
- **Other facilities**, such as childcare, customer space, tea/coffee-making, private space.

Customers enjoyed spending time in provider offices with a **welcoming environment**. This meant that the offices should have a professional and friendly atmosphere and must be clean, warm and comforting. Customers expressed a view that providers should have a setting where customers are happy to sit and 'hang out', rather than spending as little time as possible in the premises. It was felt that the atmosphere adds to the tone of the provision and has an impact on customer motivation.

'The thing is that if the environment is welcoming then it puts the customers at ease and they're willing to cooperate. It doesn't become a sentence, a jail sentence as such. It becomes an enjoyable experience that will benefit both the customer and the trainer because the trainer can learn from the customers as well.'

(Female, customer workshop)

Similarly, it was felt that the atmosphere should also be **relaxed** in terms of being calm with not too many customers, unlike experiences of queues in Jobcentre Plus offices, and being able to sit down, not having to wait. Customers wanted easy access to their adviser if they needed it rather than always having to wait for their appointment.

'Just it's wide open. You're no queuing up like anywhere else...take a seat, take a seat, take a seat. In here you've got all your individual tables while you're waiting, and I've never really been kept waiting very long. I'm normally seen at my appointment time or maybe 10 minutes later, that's it.'

(Male, 50+)

Customers also expressed a desire for provider offices to be **clean and hygienic** to ensure that the premises were pleasant and presentable for spending time in.

Finally, **other facilities** that were considered to be important included childcare, customer space, tea/coffee-making facilities or a cafe, and private space for sensitive discussions. Access to tea and coffee was welcomed, and helped to make customers feel they were being treated like adults and taken seriously by the provider. They also felt that providers should allocate a space in which customers could interact outside of the classroom.

3.8.1 Customer variations

Different customer types had different needs in relation to provider premises. For example, depending on their level of disability, many disabled customers required easy access to the premises, such as being on the ground floor or having a lift. Religious customers valued having somewhere to pray if they had to spend the entire day on site. Lone parents were frustrated with having to put their child into expensive childcare or having to bring their child to the provider offices where they were not welcomed. They felt there was a need for more child friendly premises and ideally, on-site childcare facilities where customers could safely leave their child(ren) for a few hours.

'If they had like a little thing, like a room where they had someone there that could sit there and draw with them, I don't know, maybe a telly or something the kids can look at or something, just like a kids play room or something... That would certainly make a lot more people willing to go.'

(Female, customer workshop)

4 Refining the descriptors

This section describes how the full list of eight descriptors was reduced to four – adviser relationship, adviser knowledge, job opportunities and skills development – to become the final metric for use in ongoing customer experience measurement. It then outlines how the final four customer metric descriptors align with the Department's Customer Insight Key Drivers – ease of access, treatment, timely response and outcome.

4.1 Refining the descriptors

As discussed in section three above, during the exploratory phase of the qualitative research, customers spontaneously suggested factors that were important for them in contracted provision. A preliminary list of descriptors was developed from these findings, and these were 'tested out' during the subsequent phase of the research with both customers and stakeholders. Following the testing phase, the preliminary list was refined and developed into a set of eight key descriptors, consisting of the following:

- Adviser relationship;
- Adviser knowledge;
- Job opportunities;
- Skills development;
- Financial support;
- Location of provider and job opportunities;
- Facilities for job searching;
- Premises.

These descriptors were developed out of testing customer needs for satisfaction across a wide range of customer groups, in terms of demographics, type of benefits, as well as level of 'work readiness'. As a result, using the comprehensive list of eight descriptors would ensure measurement of a broad spread of customers' needs for satisfaction.

However, reporting back data to customers on eight items was felt to be impractical and potentially confusing, and would not facilitate a simple, easy to use comparison between providers which was one of the key objectives of the study. It was decided that using all eight descriptors was not the best approach for the metric. Thus, it was decided to refine the number of descriptors to four in order to develop a shorter, more functional metric, while maintaining coverage of a range of customer needs. In refining the descriptors it was necessary to ensure that variations highlighted between customers in terms of needs and different priorities were considered and that all customers' needs would be measured. Despite differences between different customer groups, it was possible to break the eight descriptors into two sets – with one set of four being generally viewed as more important than the other set, as below:

First set:

- Adviser relationship;
- Adviser knowledge;
- Job opportunities; and
- Skills development.

Second set:

- Financial support;
- Location of provider and job opportunities;
- Facilities for job searching; and
- Premises.

For the most part, the first set of four descriptors were identified as critical when searching for employment, while the other set of four descriptors were seen as 'nice-to-have' but less crucial for the task at hand. Therefore, despite differences in priority accorded to the descriptors, it was possible to highlight a sub-set of key descriptors that could be applied to almost all customers, ensuring measurement of priorities across a range of customer groups. These were as follows:

- Adviser relationship;
- Adviser knowledge;
- Job opportunities; and
- Skills development.

Not only were these four descriptors consistently ranked as being among the most important factors for customer satisfaction, they were also emphasised as important across all customer categories identified above, although not to the same degree of priority. Therefore, developing the metric from this sub-set of descriptors would cut down the amount of information on the survey and simplify

the reporting of results while ensuring insight into a wide range of customer needs for satisfaction.

It is important to note that these four descriptors may in reality require more than four distinct items to form metrics, depending on the level of detail to which the metrics are applied. For example, a metric establishing customer satisfaction with 'adviser relationship' may need to be broken down into some or all of its constituent elements.

Irrespective of how the final metric is developed, the research highlights the importance of ensuring that customer satisfaction is measured across factors that are relevant to customers with differing levels of perceived job readiness.

4.2 Alignment with Customer Insight Key Drivers

The Department's Customer Insight Key Drivers set out '*which factors affect customer perceptions of service experienced*'¹⁰ from the Department. They are based on all customers' interactions with services across the Department including Jobcentre Plus, the Pension Service and the Disability and Carers Service. Rather than evaluating opinion of experience with one aspect of service or DWP agency, the Key Drivers seek to understand customers' '*overall experience of DWP*'¹¹. The four Key Drivers and their constituent elements are detailed in Table 4.1

¹⁰ Department for Work and Pensions (2009) Customer Insight Quantitative Research, page 1 (available at: http://statistics.dwp.gov.uk/asd/asd1/dsopsa/DSO7_REPORT.pdf).

¹¹ Ibid.

Table 4.1 Customer Insight Key Drivers

Ease of access	Treatment	Timely response	Outcome
Ease of finding what's available	Staff listening	Told how long it will take	Confidence in payments being correct
Ease of access through suitable method	Staff treating customers with respect	Claim forms/ correspondence submitted being acknowledged	Receiving explanations for decisions or outcome of contact
Process simple and easy to understand	Staff being helpful and polite	Being kept in touch as claim progresses	Right outcome reached
Ease of understanding written communication	Staff being knowledgeable about entitlement and process	Speed entitlement received/conclusion reached	Finding employment
Not having to repeat information	Staff telling customers about other possible entitlements and support		Informed of next steps if dissatisfied with outcome
Process and information being linked with other government services	Feeling comfortable with the service		
	Trusting the organisation		

The Key Drivers inform Departmental Strategic Objective Seven (DSO7), which relates to *"making DWP an exemplar of effective service delivery to employers and individuals"*¹². They also inform the ERSA (Employment Related Services Association) document 'Our Shared Promise on Customer Care'¹³, developed by ERSA and supported by DWP and Jobcentre Plus, which sets out the mutual expectations and responsibilities of customers and providers of contracted employment provision. The customer metric descriptors recommended at section 4.1 align with the Key Drivers as follows:

¹² <http://research.dwp.gov.uk/asd/asd1/dsopsa/dso7.asp>

¹³ <http://www.dwp.gov.uk/docs/customer-promise.pdf>

Table 4.2 Customer Metric descriptors' alignment with Key Drivers

Adviser relationship	
Treatment	Staff listening Treating customers with respect Being helpful and polite Feeling comfortable with the service Trusting the organisation
Timely response	Told how long it will take Being kept in touch
Ease of access	Process simple and easy to understand Ease of understanding communication Not having to repeat information
Adviser knowledge	
Treatment	Staff being knowledgeable about entitlement and process Telling customers about other possible entitlements or support
Outcome	Right outcome reached Finding employment
Job opportunities	
Outcome	Right outcome reached Finding employment
Timely response	Speedy conclusion reached Ease of finding what's available
Ease of access	Ease of access through suitable method
Skills development	
Outcome	Right outcome reached Finding employment
Treatment	Telling customers about other possible entitlements or support

While the Key Descriptors recommended for the Customer Metric align with the Customer Insight Key Drivers there are differences in emphasis. This is because the Customer Metric descriptors are based specifically on the needs of customers of contracted employment provision. For example, when considering all customers who contact the Department 'skills development' may not be a primary requirement, but it is very important for customers on an employment programme which aims to help them move towards work. The customer metric reflects the specific needs of customers of contracted employment provision while remaining consistent with the broader Key Drivers.

5 Practical issues

In addition to exploring factors for customer satisfaction, the research also considered practical issues around gathering and communicating information about provider performance. This chapter outlines participants' views about conducting surveys with customers and methods for informing customer choice between providers. Finally, suggestions for the next steps in the development of the metrics are offered.

5.1 Survey approaches

Some customers mentioned that they would have potential concerns about the anonymity of their responses and said that people may not be honest if they felt that providers would find out what had been said. As such there were concerns about providers administering the survey themselves.

Customers were asked about the suitability of various survey methods for collecting customer views about provider performance.

- **Postal** – Customers liked the flexibility of being able to fill in the survey in their own time, at home if they wanted. This was felt to be more relaxed, allowing for a more considered response for those with busy lifestyles. One potential problem highlighted related to the difficulty of ensuring high response rates, especially as some customers expressed negative views of form-filling, particularly without receiving a financial incentive to do so.
- **Face-to-face** – Customers felt this method required the least effort on the part of the respondent. However, it was acknowledged to be potentially costly and time consuming and customers recognised that it may not be feasible.
- **Telephone** – Customers felt that telephone interviews shared the advantage of ease of response with face-to-face interviewing.
- **Online** – Customers generally viewed online completion positively, although potential problems were identified regarding a lack of IT resource and a lack of IT skills. Customers lacking computer literacy skills or access to a computer at home would have to complete the questionnaire using the providers' computers, potentially undermining perceptions of anonymity and confidentiality.

Customers expressed a view that there was a need to **incentivise** participation in the survey to increase the response rates and quality of responses. However, it is important to note that customers were taking part in an incentivised research interview and had therefore been exposed to this option, which may have contributed to this expectation.

In terms of **timing**, customers generally felt that it would be best to conduct the survey towards the end of the provision to ensure that customers had experienced a substantial amount of the process and would have a more informed opinion. Another suggestion was that it could be completed twice – once in the middle and once towards the end of the process to assess how views had changed over time. Providers favoured having it at the end of the process as there were concerns about initial resistance and negativity towards provision from new starters.

5.2 Methods for informing customer choice

To research the best method of informing customer choice, it was explained to customers that the results from the survey would be communicated to them in some form to ensure an informed choice when selecting a provider. This section outlines the most popular suggestions from customers for communicating provider performance.

It was generally felt that each provider should have a **leaflet** or small information pack with information about their offering and what customers could expect from the programme. The content of the leaflet should include information on the length of the programme, and what to expect in terms of basic support and training, as well as any additional support available such as childcare. Providers should also specify whether they had any specialisations with regard to employment sectors, industry specialisms or types of training, in addition to their outcome rates.

In terms of format, there were two main requirements: firstly, that it should be attractive, colourful and interesting, to ensure customers want to read it; and secondly, that it should be simple, clear and easy to understand, so that it will communicate the message to customers. Without these requirements in place, customers felt they were unlikely to fully read and consider the information.

Obtaining information from a **neutral** information source, such as previous customers, was perceived to be important as leaflets could be seen as a marketing tool and therefore not trusted entirely. As a result, there was a general view that the leaflet should include verbatim comments from previous customers outlining their experiences and views of the provision. Customers highlighted the importance of word of mouth when selecting a provider and even suggested having an opportunity to 'try out' each provider before making a selection.

With regard to the **rating** system, this was generally viewed favourably by customers as it was felt this would be useful when comparing providers and making an informed decision. However, concerns were expressed that customers' opinions and needs vary considerably and therefore a single rating may be inadequate to cover this range. For this reason, customers emphasised the need to break down the indicators and provide an explanation for each, preferably a facilitated explanation delivered face-to-face.

5.3 Next steps

The next stage of the development of the customer metrics will involve adapting the four key descriptors (Adviser relationship, Adviser knowledge, Job opportunities and Skills development) so that they can be used in a quantitative survey questionnaire. Once an initial questionnaire has been drafted there will be a small programme of cognitive testing to quality assure the proposed questions and identify any potential problems. Finally, there will be a large scale pilot of around 400 telephone interviews to test fieldwork procedures and likely response rates. The pilot will also provide data that can be used to test how the metrics can be analysed/reported.

Appendix A

Scoping exercise

Prior to the main research with customers, a scoping exercise was conducted to better understand the issues around the development of a customer metric and to help prepare the research tools for the following stages. The scoping exercise included both desk research and site visits with providers and the information gathered has been used to inform the development of the customer experience metric.

Desk research

The desk research for the scoping stage reviewed sources of information covering:

- the use of metric by other organisations;
- previous research on Jobcentre Plus customers;
- practical survey considerations around survey mode and administration; and
- how results can be presented back to customers.

This section brings together the findings from the desk research.

Experience of other organisations in using metrics for customer research

This section draws together the evidence on customer metrics. While there is no evidence on the use of metrics for contracted employment provision, experience from the provision of other public services provides a useful starting point from which to develop metrics in this study.

The experience of other organisations has identified a process for using customer metrics:

1. identify key drivers;
2. convert key drivers into metrics;

3. convert metrics in to survey questions for use in surveys;
4. review survey findings as part of performance measurement.

Each of these stages is now examined in turn.

Identify key drivers

The first stage in using customer metrics is to identify the **key drivers of customer satisfaction**. The research study identified relevant drivers for customers, but existing evidence provided a useful context by showing common or typical drivers.

A number of studies have identified the key drivers of satisfaction with services. The report *Developing measures of satisfaction for local government services* (LGA and NCC, 2006) usefully summarises the key drivers from three of the best known sources: the Canadian Citizens First Survey, Servqual (a private sector model) and a Cabinet office study *The Drivers of Satisfaction with Public Services*.

Table A.1 Key drivers for satisfaction with services

Canadian model	Servqual	Cabinet Office
Outcome	Outcome	Delivery
Timeliness	Reliability	Timeliness
Knowledge, competence	Assurance (knowledge and competence)	Staff professionalism
Courtesy, comfort	Responsiveness	Staff attitude
Fair treatment	Tangibles	Information and access

These three models all bring together the key drivers from a wide range of services, and so (as noted in the report) '*can only be the starting point of understanding customer experience*' for individual providers. Nevertheless, three areas feature prominently:

- outcome/delivery;
- timeliness; and
- staff knowledge/professionalism.

It is, therefore, likely that these are core elements of customer service that are likely to be important to any type of service.

The same report references Accenture's 7th annual assessment of international public service performance (*Building the Trust*, Accenture, 2006), in which governments that are most successful in delivering public service excellence are seen as developing a feeling of 'trust' among consumers. The report points out that the building of trust depends on a number of factors, including responsiveness to customers based on real understanding; equity; transparency; reliability.¹⁴

¹⁴ *Developing measures of satisfaction with local government services*, LGA and NCC, 2006. <http://www.lga.gov.uk/lga/aio/1097276>

Converting key drivers into metrics

The next step involves taking the key drivers, which tend to be abstract concepts (e.g. timeliness) and **converting these into metrics**. Essentially this involves making the items more **concrete and tangible**.

A common way of doing this is to set out **service standards**. Jobcentre Plus has published service standards, which include a commitment to *'be friendly, fair and helpful'*. The service standards also include more specific commitments, such as aiming to reply to a letter, fax or email with 10 working days. This indicates that metrics can be either:

- **general and subjective** (staff will be friendly, fair and helpful); or
- **very specific** (replying within 10 days).

The latter is an easier metric to measure – it can be measured clearly on a factual basis. However, it relies on the ability to define an appropriate minimum standard and only covers a specific element of the key driver (in this case timeliness). The more general metric is less easy to measure, but is more all-encompassing.

The Department for Work and Pensions (DWP) Customer Insight Key Drivers research takes the approach of producing customer metrics that are linked to the Departmental Strategic Objective 7 (DSO7)¹⁵. The research focuses on the four key drivers that reflect overall customer experience, but measures these as metrics composed of individual sub-drivers that focus on more detailed aspects of the customer experience.

Other organisations have linked customer metrics to published service standards (similar to the service standards used by Jobcentre Plus). For example, the UK Identity and Passport Service (IPS) publishes service standards, which state that

'in all of your dealings with us, you can expect: our staff to be polite, helpful and professional; passports to be issued in line with our published standards; the details on your passport to be correct and your supporting documents to be returned promptly; special provisions and services for people with disabilities; and clear and helpful explanations from our staff if you are denied a British passport because of citizenship or other grounds.'

The IPS is considered an example of good practice in transforming customer perceptions through the use of metrics. Again, there is a combination of more general, subjective measures and more specific outcomes.

This raises a question as to whether the metrics used in this survey should be developed into service standards, or simply used as a mechanism for comparing provider performance. The advantage of the former is that the process is completely transparent, with customers and provider staff clear on the targets the providers are trying to achieve and the basis on which comparisons are being made. However, a prescriptive approach would conflict with DWP's stated intention of allowing for 'greater flexibility in delivery'¹⁶.

¹⁵ <http://research.dwp.gov.uk/asd/asd1/dsopsa/dso7.asp>

¹⁶ Department for Work and Pensions (2008) DWP Commissioning Strategy, page 8.

Incorporating metrics in customer surveys

Stage three of this study converts key drivers of satisfaction into metrics, and then **develops survey questions** to measure these metrics. Published guidance examines this process; for example, the Canadian Citizens First Model includes 14 core questions, representing the main key drivers and metrics. For example, survey respondents are asked to rate the statement *'staff were knowledgeable and competent'*, on a five-point agree/disagree scale and a five point importance scale.

Cabinet Office guidance¹⁷ sets out best practice in developing a customer satisfaction questionnaire, for example setting out the differences between **overall rating measures** (which summarise customers' perceptions) and **service-specific questions** (probing on details such as *'were they seen promptly'*, *'how easy were the forms to complete'* and so on). In addition, a follow-up study of respondents to a DSS/Benefits Agency survey examined *'overall satisfaction'*. The study found that while the term *'very satisfied'* did indeed reflect a positive experience, the response *'fairly satisfied'* sometimes actually represented dissatisfaction with the service.¹⁸ As such, some surveys use items that can offer more discrimination between positive responses and better identify when a customer has had a positive experience. Friedman and Amoo¹⁹ highlight a number of rating scales that can do this, such as:

- **Expectations** scale – *'Overall, compared with what you expected how would you rate the services you received? Much better than expected, better than expected, about as well as expected, worse than expected or much worse than expected'*.
- **Improvement** scale – *'How much improvement, if any, would you say that... needs to make to its services? No improvement; Slight improvement; Some improvement; Much improvement; Huge improvement'*.

It is sensible to include a **combination of different types of questions** to represent metrics, with some overall satisfaction questions, other questions which assess overall performance (expectations or improvement), and questions focusing on specific aspects of service (e.g. speed of response).

¹⁷ HM Government (2007). *How to measure customer satisfaction*. <http://www.ccas.min-financas.pt/documentacao/how-to-measure-customer-satisfaction>

¹⁸ Elam, G. and Ritchie, J. (1997). *Exploring Customer Satisfaction*. DWP Research Report No. 63. <http://www.dwp.gov.uk/asd/asd5/rrep063.pdf>

¹⁹ Amoo, T. and Friedman, H.H., *Journal of Marketing Management*, Vol 9, Winter 1999, 114-123.

Review survey findings as part of performance measurement

Previous work on customer satisfaction research emphasises that any surveys should form part of a **strategy for continuous service improvement**.²⁰ Although the proposed ongoing measurement survey is quite specific in its role (to assess the performance of providers as a basis of comparison), it is important that any survey measurement should be seen as a means to an end (the end being to provide the best possible service to customers). There is always a danger with any measures or metrics that are being used for assessment that scoring highly against these metrics becomes a narrow focus for providers, rather than being seen as part of a broader remit.

In addition, it is important that the measurement survey is not seen as the only means of obtaining feedback from customers. Other organisations argue for the use of a **range of feedback mechanisms**, for example:

- The Local Government Association report *Developing measures of satisfaction for local government services* argues for a combination of feedback/consultation methods, including focus groups, citizens' juries, deliberative fora, collaborative consultation and reactive approaches such as monitoring complaints.
- The Cabinet Office report *Customer insight in public services – A Primer* specifies a range of different ways in which customer insight can be obtained, including: front line staff; website analysis; ethnography; consultation; formal and informal contact with representative bodies; through agents or intermediaries; written correspondence and media coverage.
- The Government of Ireland Customer Charter initiative also details various methods of obtaining evaluation of performance: customer surveys, customer panels/focus groups, comment cards, face-to-face interviews, mystery shopping, tracking systems (e.g. telephone and correspondence tracking), employee surveys/staff suggestion schemes, external validation and self-assessment schemes.

Previous research on Jobcentre Plus customers and relevant groups

This section summarises research evidence on attitudes to service provision, among Jobcentre Plus customers and other relevant groups. In particular, it identifies evidence on aspects of provision that are considered the most important by customers (or 'key drivers' of satisfaction). This evidence can be used alongside the findings from the qualitative research to develop key drivers in this study.

There is a wealth of research evidence on customers' views of specific interventions and services. However, this information is often very specific (e.g. relating to a particular intervention or element of a service). We have, therefore, focused on findings which identify important aspects of overall customer service (and therefore,

²⁰ For example, *How to measure customer satisfaction: A toolkit for improving the customer experience in public services*, Cabinet Office, November 2007; and the Canadian Institute for Citizen-Centred Service, *Toward Citizen-Centred Service Delivery*, 2004.

have a broader relevance). Where possible, we have also examined research that is relevant to Flexible New Deal (FND) or other contracted employment provision, although there is generally limited research evidence.

Of most relevance to FND is evidence from Employment Zones and the previous New Deal programmes. Qualitative research with Employment Zones and New Deal customers identified a number of service elements that were seen as most effective in helping customers move into work. It also highlighted areas for potential improvement to the current Jobcentre Plus process²¹. These included:

- **continuity**: meeting with the same personal adviser on each visit;
- **personalised and tailored** one-to-one advice;
- greater **collaboration and discussion** with customers (e.g. rather than being 'given' an Action Plan);
- a more '**hands on**' approach from the personal adviser (e.g. proactively calling a customer if a job vacancy becomes available);
- **advisers being better informed** about sector-specific requirements and available training.

These findings confirm other evidence on the **importance of the personal adviser role**. A review of evidence from recent New Deal and other Jobcentre Plus programmes observed that:

*'one of the strongest conclusions to be drawn from evaluation evidence is the perception that personal advisers are critical to the success or otherwise of interventions. This is not just a technical matter of how well a service is delivered but also a matter of how well the personal adviser is able to engender a desire to seek and accept employment amongst customers and to build on the initial engagement by providing support and encouragement of an appropriate type.'*²²

The same report also highlighted the fact that:

'attitudes to Jobcentre Plus and satisfaction with its services may differ systematically across customer groups, with the factors leading to customer satisfaction being different for different customer groups...It is thus likely that different customer groups not only look for different things from a programme but also value what they receive in different ways.'

²¹ Adams, L. and Carter, K. (2008). *Focus groups with New Deal and Employment Zone customers: Research to inform Flexible New Deal*. DWP Research Report No. 522.

²² Hasluck, C. and Green, A. (2007). *What works for whom? A review of evidence and meta-analysis for the Department for Work and Pensions*. DWP Research Report No. 407.

Looking at research evidence on different Jobcentre Plus customer sub-groups:

- For **younger customers**, research on NDYP found that the role of Personal Advisers was pivotal, requiring '*a focus on the individual's needs and aspirations coupled with a **responsive** approach to designing the appropriate programme of activities for the young person.*' **Continuity** of the advisory relationship was also found to be important at certain stages after the Gateway period.²³
- For **older customers** (50 or over), one study highlighted a number of approaches which were particularly effective. '*These include personal adviser **support, flexible training and financial incentives**.*'²⁴ Other research noted '*the importance of **attitude***' (i.e. customers' enthusiasm in looking for work and being receptive to help and support).²⁵

²³ O'Connor, W., Ritchie, J., Woodfield, K. (2001). *Experiences of New Deal: Qualitative Profiles of Young Participants*. DWP WAE No. 71.

²⁴ Moss, N. and Arrowsmith, J. (2003). *A review of 'what works' for clients aged over 50*. DWP WAE No. 174.

²⁵ Hasluck, C. and Green, A. (2007). *What works for whom? A review of evidence and meta-analysis for the Department for Work and Pensions*. DWP Research Report No. 407.

- Among **longer-term unemployed** customers, research has found that *'attitudes are largely determined by a mix of the following: the extent to which participants felt their needs were taken into account during the process; their views of their adviser and the advisory interviews; their views of any activities undertaken; the impact of the programme, both in terms of hard outcomes (i.e. jobs) but also softer measures (e.g. their views on the likelihood of finding work).'*²⁶ A review of evidence found that *'an important aspect of provision for this customer group is **re-motivation and support in rebuilding confidence***, given the length of time they had been out of work.²⁷ Increased confidence and self-esteem were also key reasons given by participants of the European Social Fund (ESF) funded Global Grants programme; this scheme focused on *'harder-to-help'* people who were out of work.²⁸ In the Employment Retention and Advancement demonstration, *'staff reported that they had greater difficulty engaging ND25+ customers than lone parents in services once they were in work.'* According to staff, there were a variety of reasons for this: New Deal for 25+ customers' desire to be independent of Jobcentre Plus, which many associated only with claiming benefits; a greater ethos of self-reliance; lower awareness of available in-work supports; and, finally, less interest in advancement, as many ND25+ customers viewed obtaining a steady job as accomplishment enough.²⁹

²⁶ Winterbotham, M., Adams, L. and Hasluck, C. (2001). *Evaluation of New Deal for Long Term Unemployed People Enhanced National Programme*. DWP WAE No. 82.

²⁷ Hasluck, C. and Green, A. (2007). *What works for whom? A review of evidence and meta-analysis for the Department for Work and Pensions*. DWP Research Report No. 407.

²⁸ Jones, G. et al. (2008). *The effectiveness of European Social Fund Objective 3 Global Grants in increasing the employability of the most disadvantaged*. DWP Research Report No. 473.

²⁹ Miller, C. et al. (2008). *Implementation and second-year impacts for New Deal 25 Plus customers in the UK Employment Retention and Advancement (ERA) demonstration*. DWP Research Report No. 520.

- Much of the published research on **lone parents** relates to voluntary participation (e.g. in New Deal for Lone Parents) in which, according to a review of evidence, 'a key to assisting lone parents into work is **engagement**' with the customer. This review also noted that 'advisers believe that it is the overall package received by participants rather than the individual elements of provision that is most important' in achieving success.³⁰ Research on Lone Parent Work Focused Interviews found that 'much emphasis is placed by advisers on the importance of building a **relationship of trust** and creating a rapport with customers that will facilitate the communication of key information, allow them to identify and respond to indications of willingness and intent to work, and to identify needs to be addressed.'³¹
- It has been noted that **disabled customers** are 'a heterogeneous sub-group facing a range of issues in entering and retaining work, and so 'what works' for customers is very varied, because of their varied circumstances and needs.' As a result, 'specificity' (i.e. an **individual focus and personal support**) and continuity in smoothing transitions is regarded as particularly valuable.³² Similarly, qualitative research with Condition Management Programme practitioners in Pathways to Work highlighted the importance of **additional time available** for customers and of the opportunity to **tailor services** to meet customer needs.³³ Evidence from New Deal for Disabled People also highlights the importance of regular adviser-initiated contacts with customers and the ability of the adviser to provide a **co-ordinating role** in planning a tailored package of support.³⁴

³⁰ Hasluck, C. and Green, A. (2007). *What works for whom? A review of evidence and meta-analysis for the Department for Work and Pensions*. DWP Research Report No. 407.

³¹ Thomas, A. (2007). *Lone Parent Work Focused Interviews: Synthesis of findings*. DWP Research Report No. 443.

³² Hasluck, C. and Green, A. (2007). *What works for whom? A review of evidence and meta-analysis for the Department for Work and Pensions*, DWP Research Report No. 407; based on Corden, A., Nice, K. and Sainsbury, R. (2005), *Findings from a longitudinal panel of clients*, DWP Research Report No. 259.

³³ Barnes, H. and Hudson, M. (2006). *Pathways to Work – Qualitative Research on the Condition Management Programme*. DWP Research Report No. 346,.

³⁴ Stafford, B. et al. (2006). *NDDP: Second Synthesis Report – Interim Findings from the Evaluation*. DWP Research Report No. 377.

- The review of evidence found that '*ethnic minority customers appear to place more weight on face-to-face contact and the nature of the interpersonal communication with Jobcentre Plus staff than white customers*',³⁵ while other research found that '*in general, adviser support was the element of New Deal that was most highly valued by [ethnic minority] respondents*'.³⁶ Broadening this to the full range of Jobcentre Plus customers, '*in the case of EM customers, particular importance (relative to white customers) is attached to the **friendliness and politeness of staff**, the fact that members of staff wear a badge or tell customers their name, the speed at which business is dealt with and the availability of help for people who have difficulties with English*'.³⁷

Cutting across the different sub-groups, however, it is clear that customers' perceptions are affected primarily by their level of motivation:

*'There is a considerable volume of evaluation evidence – and probably a consensus amongst all concerned – that the **motivation of the individual customer** is a key factor in the effectiveness of any form of provision'. This means that 'a key to effective provision would appear to be for Jobcentre Plus and providers to engage effectively with customers and for customers to 'buy in' to any provision to which they are referred.'*³⁸

There is also evidence about the wider population of Jobcentre Plus customers; for example, the 2007 DWP Customer Satisfaction Survey included an analysis of the service factors that appeared to be driving overall satisfaction. As this survey covers all benefit claimants and includes those at an early stage of their claim, its coverage is much broader than in the proposed study, which will focus on longer-term claimants receiving more intensive support. Nevertheless, this gives a useful overview of the issues that are important to Jobcentre Plus customers.

This analysis found that '**dissatisfaction with office conditions** is a major driver of dissatisfaction, particularly for Jobseeker's Allowance customers'; and that:

³⁵ Hasluck, C. and Green, A. (2007). *What works for whom? A review of evidence and meta-analysis for the Department for Work and Pensions*. DWP Research Report No. 407.

³⁶ Hudson, M. et al. (2006). *Ethnic minority perceptions and experiences of Jobcentre Plus*. DWP Research Report No. 349.

³⁷ Johnson, S. and Fidler, Y. (2006). *Jobcentre Plus customer satisfaction: ethnic minority booster survey 2005*. DWP Research Report No. 338.

³⁸ Hasluck, C. and Green, A. (2007). *What works for whom? A review of evidence and meta-analysis for the Department for Work and Pensions*. DWP Research Report No. 407.

'provision of incorrect or contradictory information is also important, particularly for Income Support and Incapacity Benefit customers. Other key drivers, in order of importance, are the extent to which customers feel that they have limited access to services; excessive time taken to deal with business; missing or incorrect benefit payments and the feeling that customers are not being treated with respect as individuals.' When asked directly about the good and poor aspects of service, positive aspects were the 'helpfulness and polite, friendly and/or approachable nature of the staff', while 'negative comments on service delivery tend to focus on technical aspects (phones engaged, queues), although more than one in five comments in this category relate to 'unhelpful' staff attitudes.'³⁹

Research on customers' experiences of first contact with Jobcentre Plus also identified key aspects of service.

*'Prominent reasons cited by customers themselves for satisfaction included the **efficiency and speed of the service and the friendliness and helpfulness** of staff. The most frequently cited reasons for dissatisfaction related to the length of time taken to process and pay benefits, the loss of documents and the provision of incorrect or contradictory advice...'*

Interestingly, almost 29 per cent of dissatisfied Jobseeker's Allowance (JSA) customers reported that they were dissatisfied as a result of the bad attitude of staff, a reason which was not felt nearly as strongly by claimants of other benefit types.

It is also useful to examine evidence from Learning and Skills Council (LSC) research among adults taking part in learning and training courses. Research on Train to Gain found that:

*'the factors involved in their assessment of quality included having an individual learning plan (ILP) against which to measure progress and understand the next steps. Learners reported how important it was to know when their training provider staff would be coming to see them, and also to know that, if circumstances demanded (due to individual or business needs), the training and assessment sessions could be rearranged. Learners also valued the positive personal relationship that they had established with their training providers.'*⁴⁰

The LSC's National Learner Satisfaction Survey has also examined key issues that are related to satisfaction.

³⁹ Johnson, S. and Fidler, Y. (2008). *Jobcentre Plus Customer Satisfaction Survey 2007*. DWP Research Report No. 480.

⁴⁰ Newton, B. et al. (2008). *Train to Gain Learner Evaluation, Report from Wave 1 research*. LSC.

*'FE learners' satisfaction with their learning experience is most positively linked to teaching staff making the subject interesting and enjoyable, and the support they give to learners; poorly planned lessons have the reverse effect. Other aspects that have a positive impact on learner satisfaction are having help and assistance available when needed; receiving prompt and regular feedback from teaching staff; teachers' management of learners during lessons; learners having the opportunity to express their views on the quality of the learning programme; and being treated with respect by staff.'*⁴¹

Practical issues in conducting a survey

Survey mode

The early stages of the study are aiming to advise on customers' preferences for the type of data collection method (or 'mode') that should be used in the ongoing measurement survey. Existing guidance confirms that:

*'one of the most important considerations when choosing a data collection method is **what would be appropriate for the service's customers**. This can involve assessing both the resources that customers can access and the difficulties that they may have in responding in certain modes.'*⁴²

For example, not all customers will have access to the Internet or to a landline telephone. Equally:

*'some customers may also have difficulties that mean that certain data collection methods are inappropriate. For example, customers who have difficulty reading, as a result of literacy problems or visual impairment, struggle to complete postal and online questionnaires.'*⁴³

The Government of Ireland guidance points out a decision on which method to use will also depend on the **normal channels which your customers use** to interact with an organisation's services. In this context, it is useful to look at previous DWP research which has looked at preferred modes of communication. When benefits customers were asked *'if at some point in the future, you needed to contact the Benefits Agency for information about applying for a benefit (or state pension), how would you do this?'*, the telephone was more popular than face-to-face contact (57 per cent compared with 36 per cent). This research found that:

⁴¹ *National Learner Satisfaction Survey 2007: Highlights*, LSC, 2008.

⁴² *How to measure customer satisfaction: A toolkit for improving the customer experience in public services*, Cabinet Office, November 2007.

⁴³ *How to measure customer satisfaction: A toolkit for improving the customer experience in public services*, Cabinet Office, November 2007.

*'a preference for telephone contact is more pronounced among less mobile people – those with disabilities or health problems, or those looking after children or the home. Face-to-face contact is most popular among younger men and those on lower incomes.'*⁴⁴

This survey also examined potential use of the Internet or email for making contact, although the low proportion preferring this to face-to-face or telephone contact (six per cent) needs to be viewed in the context of the date of the survey (fieldwork in 2001). A more recent study on in-work statements (IWS) asked those customers who had returned the IWS their preferred channel for returning it.

*'Only a third stated that they would prefer to return it in person rather than provide the information by post, phone or e-mail. A third (35 per cent) stated that they would prefer to return the IWS online and a quarter (25 per cent) expressed a preference for returning the information by phone.'*⁴⁵

Administration

Once the measurement survey has been developed, there is a question as to whether this should be **administered centrally** (by DWP or Jobcentre Plus) or whether **providers should carry out their own surveys**. There are a number of existing cases where local/regional bodies are required to carry out their own surveys, based on guidance provided by a government department or governing body. Examples include:

- National Health Service (NHS) Adult Inpatient Survey. The NHS provides survey guidance to individual NHS trusts, including detailed advice on requirements for conducting the survey; detailed instructions on sampling, design and analysis. The surveys require standardised procedures to allow comparability.
- The Audit Commission's Place Survey Technical Manual provides instructions to local authorities in running the Place Survey in their localities. It includes a requirement to meet eight common standards in survey design and administration (e.g. has to be postal survey, core questions).
- Assessments of Policing and Community Safety (APACS): Home Office survey guidance includes detailed advice on requirements for conducting user satisfaction surveys, detailed instructions on sampling, design and analysis.
- Best Value Performance Indicator (BVPI) User Satisfaction Surveys, carried out by local authorities and housing providers, based on guidance from Communities and Local Government (CLG) and the Audit Commission.

⁴⁴ Coleman, N., Jeeawody, F., Wapshott, J. (2002). *Electronic government at the Department for Work and Pensions: Attitudes to electronic methods of conducting benefit business*. DWP Research Report No. 176.

⁴⁵ Adams, L., Kelly, J. and Fish, S. (2008). *In and Out of Work pilot evaluation: Findings from staff and customer research*. DWP Research Report No. 508.

- Annual self-assessments required by providers of further education, work-based learning and community learning funded by the Welsh Assembly Government. Customer satisfaction is one of elements of the information required.

These surveys vary in terms of the amount of flexibility that is allowed to providers. Some are very prescriptive (e.g. the APACS example), while some offer 'best practice' guidance only (e.g. the Welsh Assembly Government example). The relative merits of the approaches depend on the objectives. In this research, the performance of different providers will be compared directly, and it is therefore vital that there is comparability in the research design – this argues for a **prescriptive approach** in which providers are required to adopt specific methods and to ask set questions.

Experience of other organisations in providing customers with choice or feeding back results to customers

The principle of choice is now firmly located within government policy on public service reform. In considering this issue in relation to the DWP's Commissioning Strategy and FND, the House of Commons Work and Pensions Committee reported that:

*'many organisations highlighted the propensity of customers to choose a provider based on its proximity to their home, rather than the services it offers, and emphasised the need to ensure that customers were properly informed, understood the importance of choice and were given an appropriate amount of information to make their decision.'*⁴⁶

However, little research evidence is available on this issue; relevant examples are shown below.

A recent qualitative study examined the views of customers in London Employment Zones where customers have been offered a choice of provider. Interestingly, this research indicated that almost all respondents did not realise that this choice was available to them. *'All but one had been assigned a provider...by Jobcentre Plus advisers automatically and had assumed that that was the only option on offer.'* If they had been offered the choice, *'a few customers felt that...they would have felt empowered. Others felt that it would have made little difference as they would not have known how to choose.'* The one respondent who could recall being offered a choice of provider felt that *'having a choice was extremely positive.'*⁴⁷

An example of providing choice to customers based on survey data is NHS Patient Choice. This uses an approach in which patients referred to see a specialist can choose where they will be treated. The information provided to patients includes data

⁴⁶ House of Commons Work and Pensions Committee, *DWP's Commissioning Strategy and the Flexible New Deal, Second Report of Session 2008–09, Volume I.*

⁴⁷ Adams, L. and Carter, K. (2008). *Focus groups with New Deal and Employment Zone customers: Research to inform Flexible New Deal.* DWP Research Report No. 522.

on how other patients rated the hospital on key items: cleanliness, how well staff worked together, whether patients were treated with dignity and respect, their level of involvement in decisions about their care, and whether they would recommend to a friend. The website also shows verbatim comments from previous users.

Summary

Using metrics for customer research

Although customer metrics have not been used previously in employment provision, other public sector organisations have been through this process, which typically involves:

- Identifying key drivers. The most common drivers in public service provision are delivery/outcome, timeliness, staff knowledge/professionalism and a feeling of trust.
- Converting key drivers into metrics, often through the use of service standards (as used by Jobcentre Plus). Metrics can either be very specific (e.g. replying to letters within 10 days) or more subjective ('were staff friendly?').
- Converting metrics into survey questions, using a combination of questions on overall satisfaction, other questions examining general perceptions (e.g. expectations, need for improvement) and more specific questions (e.g. on waiting times).
- Reviewing survey findings as part of performance measurement, recognising that metrics are only a means to an end (in improving the service provided to customers) and using other feedback mechanisms (in addition to surveys) to monitor performance.

Previous research on Jobcentre Plus customers and relevant groups

Previous research evidence among Jobcentre Plus customers can inform the development of key drivers. Evidence from customers receiving more intensive support (e.g. New Deal programmes) shows that:

- the role of the Personal Adviser is key, in providing a personalised, knowledgeable service;
- the motivation of the customer is also important; this stresses the need to engage effectively with customers at an early stage.

However, there are differences between customer groups, which can be summarised as follows:

Table A.2 Differences between customer groups

Group	Key element of service
Younger job seekers	Responsiveness, continuity
Older job seekers	Flexibility, incentives, increasing enthusiasm
Long-term unemployed	Increasing confidence, engagement
Lone parents	Relationship of trust
Disabled customers	Giving time to individual needs, co-ordination of services
Ethnic minority customers	Staff attitudes

- Office conditions, speed/efficiency of service and the helpfulness of staff are other important factors amongst Jobcentre Plus customers.

Practical issues in survey delivery

The survey that will be used to monitor provider performance will need to:

- use an appropriate data collection method, taking into account any restrictions (e.g. not all customers have access to the Internet) and the normal channels used by customers in accessing services.
- either be centrally administered, or (if administered by providers) include prescriptive guidance as to how the survey should be conducted.

Site visits with providers

British Market Research Bureau (BMRB) researchers visited three contracted employment provider sites to better understand the customer experience and to consider key factors underpinning customer satisfaction. The sites we visited offered a range of provision including Pathways to Work, Employment Zones, and New Deal provision. Findings from this exercise informed the development of the topic guide for the exploratory qualitative research with customers.

Key factors for customer satisfaction

Providers had all conducted some form of customer feedback or evaluation. These included a wide range of collection methods, such as 'opinion boxes', evaluation forms, and discussion forums. Based on this information, providers highlighted the following factors, in no particular order, as being important to ensure customer satisfaction:

- **Location** – Customers were not thought to be willing to travel far for either provision or work placements. It was therefore thought that sites must be easily accessible by public transport.

- **Environment** – Customers were thought to value coming to a bright, professional office, which offered the following: open plan spaces but with access to private interview rooms; access to kitchen areas with tea, coffee and biscuits; and access to other facilities, such as prayer rooms and space to interact with other customers outside of the classroom.
- **Respect** – The following issues were identified as important in relation to respect: Timeliness of advisers, for example, keeping appointments, responding to queries and following through on promises; equal access and opportunities for everyone; and honesty and transparency in all dealings.
- **Adviser** – The quality of advisers was identified as being key to the process, for example through providing ongoing one-to-one support.
- **Financial support** – Providers will sometimes supply money or vouchers for clothes, materials, and other needs related to finding work.
- **Tailored support** – It was felt that it is important to tailor support to the needs of the customer, focusing on their individual health, emotional and cultural needs.
- **Feedback** – It was perceived as important to be responsive to customer suggestions, for example through the evaluation of services or having a group meeting with clients.

Suggestions for conducting the research

Providers offered a number of suggestions for conducting the research, both in terms of the developmental qualitative research and the full quantitative survey. These are outlined below:

- **Customer recruitment** – Certain days of the week are busier for different providers and would therefore be better for recruitment.
- **Topic guide development** – All providers have some form of research such as learner feedback forms or a mid-point questionnaire and they feel this could provide further insight into customer satisfaction.
- **Survey development** – All of the providers conducted an exit interview with customers and this could provide a good time to undertake the customer survey.
- **Survey sample** – Providers find it difficult to get feedback from customers who prematurely drop out of the programme and feel this needs further consideration to ensure all views are included in the research.

Suggestions for presentation of information

A limited number of suggestions were also put forward in relation to how information about providers should be presented to customers. These included the following:

- **Information content** – Information should be provided about employment success rates, basic programme outline, level of support, programme intensity, and customer experience.
- **Level of information** – Certain clients feel unable to process information about different providers, therefore information should be simple and straightforward.
- **Other sources of information** – Beyond written information, word of mouth was acknowledged to be very important, affecting the provider that customers would choose.

Appendix B

Qualitative recruitment and research methodology

The recruitment was managed by our internal field team. Field managers were fully briefed on the project and provided with detailed recruitment instructions and a screening questionnaire for recruiters to assess respondents' eligibility to participate in the research. All recruiters are members of the IQCS (Interviews Quality Control Scheme).

All respondents were recruited on-site within specified provider offices using approved recruitment screeners to assess participant eligibility.

The following tables outline the recruitment quotas achieved for the two stages:

Table B.1 Exploratory qualitative research

Primary quota				
Customer type	Region 1	Region 2	Region 3	Total
18-24 (at least 6 months unemployed)	10	12	10	32
25+ (12+ months unemployed)	10	10	10	30
50+ (6 months unemployed)	8	8	8	24
Disabled (claiming IB and SDA)	8	8	8	24
Lone parents	8	9	8	25
Total	44	47	44	135
Secondary quota (across all areas)				
Gender	Male	Female		
	80	55		
Ethnicity	BME			
	18			
Previous experience	Extensive – more than six months	Some – between four weeks and six months	Minimal – less than four weeks	
	69	52	14	
Type of provision	Employment Zone	Non-employment Zone		
	98	37		
Total				135

Table B.2 Testing

Primary quota			
Customer type	Workshop 1	Workshop 2	Total
18-24 (at least 6 months unemployed)	5	5	
25+ (12+ months unemployed)	1	2	
50+ (6 months unemployed)	2	1	
Disabled (claiming IB and SDA)	0	1	
Lone parents	2	1	
Total	10	10	20

Secondary quota (across all areas)			
Gender	Male	Female	
	7	13	
Ethnicity	BME		
	13		
Previous experience	Extensive – more than six months	Some – between four weeks and six months	Minimal – less than four weeks
	10	6	4
Type of provision	Employment Zone	Non-employment Zone	
	19	1	
Total			20

Fieldwork was carried out by ten experienced qualitative researchers, trained in the techniques of non-directive interviewing.

Verbatim quotations are used throughout this report to illustrate points made; such quotations are referenced according to relevant quota characteristics.

Qualitative analysis

Material collected through qualitative methods is invariably unstructured and unwieldy. Much of it is text based, consisting of verbatim transcriptions of interviews and discussions. Moreover, the internal content of the material is usually in detailed and micro-form (for example, accounts of experiences, inarticulate explanations, etc.). The primary aim of any analytical method is to provide a means of exploring coherence and structure within a cumbersome data set while retaining a hold on the original accounts and observations from which it is derived.

Qualitative analysis is essentially about detection and exploration of the data, making sense of the data by looking for coherence and structure within the data. **Matrix Mapping** works from verbatim transcripts and involves a systematic process of sifting, summarising and sorting the material according to key issues and themes. The process begins with a **familiarisation stage** and would include a researcher's review of the audio tapes and/or transcripts. Based on the coverage of the topic guide, the researchers' experiences of conducting the fieldwork and their preliminary review of the data, a **thematic framework is constructed**. The analysis then proceeds by **summarising and synthesising the data** according to this thematic framework using a range of techniques, such as cognitive mapping and data matrices. When all the data have been sifted according to the core themes the analyst begins to **map the data and identify features within the data**: defining concepts, mapping the range and nature of phenomenon, creating typologies, finding associations, and providing explanations.

The mapping process is similar for both individual interviews and group discussions. The analyst reviews the summarised data; compares and contrasts the perceptions, accounts, or experiences; searches for patterns or connections within the data and seeks explanations internally within the data set. Piecing together the overall picture is not simply aggregating patterns, but it involves a process of weighing up the salience and dynamics of issues, and searching for structures within the data that have explanatory power, rather than simply seeking a multiplicity of evidence.

Appendix C

Topic guide – Exploratory qualitative research

Aim: To explore in depth the key drivers underpinning customer experience in relation to contracted out employment programmes.

Specifically, this research will explore:

- Key factors impacting on experiences of provision overall, as well as consideration of specific stages throughout the service delivery 'journey', including the referral process; initial contact with the provider; ongoing support and provision given; and the transition into work.
- Details of the information required by customers to effectively inform decision-making. This will include:
 - What information customers require to make informed choices.
 - How ideally this should be formatted and communicated.

Introduction

- About the project: Exploring what underpins people's experiences of training and employment provision.
- British Market Research Bureau (BMRB) independent research agency; working on behalf of the Department for Work and Pensions (DWP).
- Purpose of the interview (see box above).
- Recording interviews; explain recordings are only available to the research team.
- Confidential – their views will be used, but not identifiable.
- Duration of interview (1 hour).
- Reassurance that any dealings with Jobcentre Plus or their support provider will not be affected by taking part in this project.

Background

- Explore personal circumstances:
 - household composition;
 - number of children, age(s).
- Briefly explore history of employment:
 - previous employment;
 - periods of unemployment;
 - reasons for unemployment;
 - current benefit payment – probe re: Jobseeker's Allowance, Employment and Support Allowance, Severe Disablement Allowance, Incapacity Benefit, Income Support.
- Briefly explore history of employment programme experience (see 'Mapping the customer journey' below to clarify focus of subsequent conversation):
 - different providers;
 - details of provision.

Mapping the customer journey

Note to researcher: Walk the customer through distinct stages in their 'journey' from referral to outcome (whether this is work, further training, dropped out, sent back to Jobcentre Plus). Researcher to plot the customer journey on the 'journey map', noting where experiences fall above and below the 'neutral' line and probing for reasons throughout. The aim of this section is to establish customers' views about the delivery of provision rather than understanding the provision itself.

Customer experience variations: Unless specified, all the following probes relate to the customer's most recent experience of contracted out provision. This is likely to be the provider they were recruited through. However, if they have any experiences from another provider that they feel are relevant, then explore; where possible clarify which provider this relates to (where possible, the focus of the conversation should be on contracted out provision rather than services provided directly by Jobcentre Plus). If this is their first experience of contracted out provision and they are at an early stage of the programme explore views hypothetically using stimulus material to ground discussions.

- Briefly explore **current experience** of employment programme provision:
 - Outline current experience at provider *[if necessary, clarify that 'provider' refers to the place they were initially recruited from]:*
 - Length of time with current provider.
 - Stages of process completed so far – probe re:

- ~ assessment;
- ~ action plan;
- ~ type of support received – job search, training, work placements, other;
- ~ reviewing progress – assessing progress and revising targets throughout the provision;
- ~ transition into work [*If relevant - may have found work and subsequently come back to provider*];
- ~ outcome [*If relevant*] – work, training, referred back to Jobcentre Plus.

Referral process from Jobcentre Plus to provider

- Explore experiences and views of the **referral process** from Jobcentre Plus to the provider:
 - Outline description of referral process and views about specific aspects; plot on ‘map; as necessary, probe on the following:
 - Information about employment programmes – how issue was broached by Jobcentre Plus adviser; information provided by Jobcentre Plus – verbal information, leaflets, website, contact details etc.
 - Information about specific provider – discussion with Jobcentre Plus adviser about employment programme/provider; whether customer had any queries/concerns about provision; outline views.
 - Decision-making processes involved (if relevant) – whether voluntary/mandatory referral; [IF VOLUNTARY] explore factors driving decision/choice of provider – location; provision; reputation; adviser recommendation; friends and family; other (outline views).
 - Next steps and information provided by Jobcentre Plus adviser – timing; location; named contact; other.
 - Views about process overall – what went well; any problems encountered; key aspects affecting their experiences.

Initial meeting with provider

- Explore experiences and views of their **initial meeting** with the provider:
 - Outline description of experiences; plot on ‘map.
 - Explore views about specific aspects – what worked well/less well; outline reasons; as necessary, probe on the following:
 - Getting to the provider – travel; access; clarity.
 - First impressions of premises – location; ease of access; décor; facilities; ‘environment’; welcoming; comfortable; other.
 - Form of initial meeting – individual meeting; group meeting; event; other.

- Information provided – whether met initial adviser; information about services; explanation of process; other.
- First impression of adviser (if met) – friendliness; professionalism; knowledge; other.
- First impressions of other staff – friendliness; professionalism; other.
- First impressions of other customers; any concerns – age, gender, safety, support; other.
- Views about process overall – what went well; any problems encountered; key aspects affecting their experiences.

Assessment by provider

- Explore experiences and views of **assessment** by the provider.

Note to researcher: If customer requires clarification, an ‘assessment’ by the provider would usually have been carried out during the customer’s first meeting with an adviser (provider staff **not** Jobcentre Plus adviser). This may have involved a discussion with the adviser, completing a questionnaire or even some form of skills testing. The aim of an assessment is to evaluate the customers’ skills, identify any issues or conditions that might restrict their employability, and establish what type of work they are looking for.

- Outline description of experiences; plot on ‘map’.
- Explore views about specific aspects – what worked well/less well; outline reasons; as necessary, probe on the following:
 - Format of assessment – discussion; questionnaire; tests.
 - Length of assessment.
 - Information collected – whether sufficient/adequate.
- Views about process overall – what went well; any problems encountered; key aspects affecting their experiences.

Development of an action plan

- Explore experiences and views of how the provider developed a plan of support to address their needs (sometimes referred to as an **action plan**).

Note to researcher: If customer requires clarification, an ‘action plan’ would usually incorporate a list of objectives and/or actions that the customer will need to undertake over the course of the provision. This may include attending training, writing a cv, meeting with the adviser, undertaking job searches etc.

- Outline description of experiences; plot on ‘map’.
- Explore views about specific aspects of developing a plan of support activities – what worked well/less well; outline reasons; as necessary, probe on the following:

- Involvement in developing a plan – whether their views were taken into account; whether developed in conjunction with adviser; whether they felt able to disagree with the actions; whether they were required to sign the plan/commit to the actions.
- Contents of the plan – whether the actions were felt to be realistic, appropriate, manageable; ‘workload’ issues; other.
- Ownership of the plan – whether they felt they ‘owned’ the plan.
- Views about process overall – what went well; any problems encountered; key aspects affecting their experiences.

Support received from provider

- Explore views about the **support** they received from the provider

Note to researcher: ‘Support’ includes any ongoing advice, training, workshops, placements, work-focused activities etc organised by the provider. Some aspects of this support may have been subcontracted to another provider; where possible probe about who provided specific elements of support.

- Outline description of experiences; plot on ‘map’.
- Explore views about specific aspects of support received – what worked well/less well; outline reasons; as necessary, probe on the following:
- Developmental support:
 - Job search – advice from advisers; access to employers.
 - Training – whether training options were interesting; relevant; adequately vocational/theoretical; understandable; outcomes/qualifications.
 - Classes – whether classes were adequate size; other customers; other facilities (drinks, biscuits etc); level of ‘comfort’.
 - Intensive activity period – views about intensive programmes.
 - Work placements – whether appropriate provision; access to viable employers.
 - Resources – access to internet, job search and other resources; IT facilities; guidance.
 - Reviewing progress – assessing progress and revising targets throughout the provision.
- Personal Support:
 - Ongoing support from adviser (provider not Jobcentre Plus) – whether advisers were knowledgeable; approachable; supportive; responsive; showed respect to customers; trustworthy.
 - Support from other provider staff – whether knowledgeable; approachable; supportive; responsive; showed respect to customers; trustworthy.
 - Range of support activities available – whether appropriate; flexible; responsive; met customers’ needs

- Financial support – provision for clothes; equipment; travel; expenses; benefit payment.
- Other support for customers' particular needs (childcare, culture, gender, age, language, disability).
- Views about process overall – what went well; any problems encountered; key aspects affecting their experiences.

Support during transition into work

- Explore views about support provided during the **transition from welfare to work**.

Note to researcher: As participants will have been recruited at the provider, they are unlikely to have experienced these latter stages of the programme. If possible draw on any previous experiences and/or discuss views hypothetically.

- Outline description of experiences; plot on 'map'
- Explore views about specific aspects of support received – what worked well/less well; outline reasons; as necessary, probe on the following:
 - Employment – views about the suitability of the employment.
 - Support with in-work benefits.
 - Ongoing contact with provider – support from adviser; access to resources/advice.
- Views about process overall – what went well; any problems encountered; key aspects affecting their experiences.

Completion of support from provider

- Explore views about the **completion** of provision.

Note to researcher: 'Completion' refers to the end of the specified time the customer was required to spend with the provider. For Flexible New Deal (FND) customers this is up to 52 weeks. However, this section explores how the provision was completed, whether this involves movement into work, further training, the participant having dropped out, or been sent back to Jobcentre Plus. As above, participants are unlikely to have experienced this stage of provision with their current provider. Therefore, draw on any previous experiences and/or explore hypothetical views.

- Outline description of experiences; plot on 'map'.
- Explore views about specific aspects of support received – what worked well/less well; outline reasons; as necessary, probe on the following:
 - Outcome – whether participant moved into work; further training; dropped out; sent back to Jobcentre Plus.

- Views about outcome – what contributed towards this outcome; how provider dealt with this outcome (e.g. exit interview; access to resources/information etc).
- Evaluation – opportunity to review provision and feedback views to provider; whether progress was assessed against action plan.
- Views about process overall – what went well; any problems encountered; key aspects affecting their experiences.

Reflection and overall views

Note to researcher: Use the ‘journey map’ from Section 3 as a visual aid for this section and a means of ranking priorities.

Changes over time: This section will be developed over the course of fieldwork; evolving to include specific aspects identified in earlier interviews.

- Explore customers’ **overall views** of provision:
 - Thinking about what has been discussed, explore overall views about the provision:
 - Aspects of provision that customers particularly liked/valued/worked well; provide examples/outline reasons.
 - Aspects of provision that worked less well; any problems encountered; provide examples/outline reasons.
 - Explore specific aspects of the provision affecting their experience; probe for elements marked above/below the ‘neutral’ line on the journey map:
 - Referral process.
 - Initial meeting.
 - Assessment.
 - Development of an action plan.
 - Developmental support provided.
 - Personal support provided.
 - Employment opportunities.
 - Support during transition into work.
 - Ongoing support needs.
 - Completion of provision.
 - Outcome.
 - Other overarching issues – workload; provider staff; premises; access to employment opportunities etc.

- Identify **key criteria** underpinning satisfaction with provision:
 - Drawing on views expressed earlier, and the list of top factors affecting satisfaction with provision from previous interviews, rank the list of top factors from previous interviews and add any missing factors [Researcher to cut up into sections before interview and customer to rank and add any missing factors].
 - Adviser relationship – consistency; relationship; respect; trust; knowledge; responsiveness; managing expectations; attitude.
 - Advisor knowledge – about jobs that are available; benefits and financial support.
 - Training – CV writing, interview training, job searching, Confidence building exercises; courses.
 - Careers advice - Talking through job roles; giving career advice/what roles might be suited.
 - Location – what they understand by accessibility; not far from home/easily accessible by public transport.
 - Financial support – Transport costs; Work/interview related expenses; advances.
 - Placements – relevant; good selection; opportunity to gain experience/get full-time work.
 - Employment opportunities – appropriate; targeted; Update list of jobs available regularly; make customers aware if suitable job comes up.
 - Environment – Clean offices; Good lighting; Comfortable chairs; atmosphere.
 - Facilities – Computers; Tea and coffee; Newspapers.
 - Feedback – opportunities to feedback; methods; responsiveness.
 - Outcome – employment found; referred back to Jobcentre Plus.
 - Overall Impact – benefits outside of finding employment; confidence; social skills; life skills.
 - If participant was choosing a provider, explore which of these issues would be the most important in making that decision:
 - Participant to 'rank' the issues highlighted above; and explain ranking.
 - Using ultimate list identified by participant, explore broader implications:
 - Whether this list of priorities would be applicable to other providers.
 - Views about whether this list would be relevant to other service users; who; outline views.
 - Explore key issues that can lead to customer dissatisfaction.
 - Explore whether their initial expectation were met/not met/exceeded.
- Explore **key drivers of satisfaction** in other areas of public life such as healthcare, or the education system.

Choice and evaluation

Note to researcher: Explain to participants that, in the future, the Government would like to give customers key information about providers so that they can choose which provider they would like to go to for employment services. In addition to information about job outcomes, this would include what previous customers thought about each provider. To do this, the Department for Work and Pensions (DWP) is now exploring how best to get customers to evaluate their provider experience.

- Explore views about ‘choice’ in **selecting a provider**:
 - Whether participant would like to choose which provider they could go to; perceived benefits/disadvantages of choice.
 - How they would make a choice; what are the key aspects they would consider [probe and explore if different from aspects outlined in section 4].
 - Perceived impact of choice.
- Explore **comparable levels of choice** they have experienced in other areas of public life; such as when choosing a GP, hospital or schools:
 - Whether participants have experience of these types of choice.
 - Views about choice in these areas.
 - How decisions were made between providers; what information was required; where participant looked for information.
 - Impact of choice.
- Explore views about **presenting information** to enable customers to choose which provider would suit them best:
 - Key information to include – probe for location, contact details, outcomes, customer satisfaction.
 - Star Rating – how to summarise information; level of depth of information required.
 - Format/length – leaflet; single sheet; website; other.
- Explore views about **collecting information** about customer experiences:
 - Timing of collecting information – point of exit; other.
 - Method of collecting information – postal survey; online survey; phone survey; F2F survey; outline views.

Appendix D

Topic guide – Testing

Aim: To build on the most important factors for customer satisfaction with contracted out providers, developed as part of the exploratory stages of research, and to 'test out' how best to measure customer satisfaction.

Specifically, this research will explore:

- Key factors impacting on experiences of provision overall.
- How to use the most important factors to develop a measurement tool/survey to measure customer satisfaction with their provider.
- Details of the information required by customers to effectively inform decision-making. This will include:
 - What information customers require to make informed choices.
 - How ideally this should be formatted and communicated.

Introduction

- About the project: See project aims.
- British Market Research Bureau (BMRB) independent research agency; working on behalf of the Department for Work and Pensions (DWP).
- Purpose of the discussion (see box above).
- Recording discussion; explain recordings are only available to the research team.
- Confidential – their views will be used, but not identifiable.
- Duration of discussion (2 hours).
- Reassurance that any dealings with Jobcentre Plus or their support provider will not be affected by taking part in this project.

Background

- Group participants to **briefly** introduce themselves, including:
 - Name.
 - Household composition, including number/age of children.
- Briefly explore history of employment programme experience [see box below to clarify focus of subsequent conversation]:
 - Probe re different providers [If necessary, clarify that 'provider' refers to the place they were initially recruited from].

Note to researcher: The focus of the conversation should be on contracted out provision rather than services provided directly by Jobcentre Plus. If this is their first experience of contracted out provision and they are at an early stage of the programme explore views hypothetically.

Key factors underpinning customer satisfaction

Note to researcher: Explain to participants that we will be exploring the key factors affecting customer satisfaction with employment provision, as identified during previous research with customers. Although the main focus is on these factors, allow space for discussing other factors that participants feel need to be highlighted.

- Explore spontaneous views about what issues they would focus on if they were choosing a provider:
 - Ask customers to 'shout out' issues; note on flipchart.
 - If necessary, briefly clarify any issues; explain that these will be explored in more detail during the workshop.

Note to researcher: Retain this list of factors to reflect back at the end of this session to ensure all issues are accounted for; and to explore any new issues.

- Explore views about factors identified from previous research with customers.

Note to researcher: Customers will initially discuss each factor in smaller groups; coming together after two factors have been considered to discuss as a larger group:

- Ask customers to break into groups of three to four.
- Handout notes sheet and show cards (two factors at a time).
- Participants to spend five minutes on each factor, discussing questions.
- Ask participants to nominate a note taker.
- After ten minutes ask whole group to discuss each factor.

SHOWCARD A: Adviser relationship

- Explore views about the importance of the **adviser relationship** for customer satisfaction:
 - Whether this was felt to be a key factor for satisfaction; outline reasons.
 - Views about the different aspects of the adviser relationship, as outlined on the show card.

Consistency – should have the same adviser throughout the process, this eliminates the need to repeatedly explain their situation.

Co-operation – adviser and customer need to work together in a trusting relationship.

Clear communication/respect – non-judgemental and communicate ‘on a level’ with the customer.

Flexible and tailored support – tailor the support given in line with the needs of the individual customer:

- Whether these cover all issues relating to the adviser relationship; anything missing/shouldn’t be included in this list.
- Whether any of these aspects are more or less important to customer satisfaction; explore reasons:
 - Explore specific needs of particular customer groups in terms of the adviser relationship; outline reasons:
 - Disabled customers – more relaxed approach allowing them time to find an appropriate and sustainable job.
 - Lone parents.
 - Specific age groups (50+; 18-24; other) - 50+ customers favoured a non-judgemental approach; younger customers favoured a proactive approach as finding employment quickly was key.
 - Other.

SHOWCARD B: Adviser knowledge

- Explore views about the importance of **adviser knowledge** for customer satisfaction:
 - Whether this was felt to be a key factor for satisfaction; outline reasons.
 - Views about the different aspects of the adviser knowledge, as outlined on the show card.

Employment knowledge – knowledge of different sectors, current vacancies and best routes to identify jobs.

Careers advice – offering advice, encouragement and practical skills.

Wider knowledge – a knowledge of related topics including benefits and accessing additional support:

- Whether these cover all issues relating to adviser knowledge; anything missing/shouldn't be included in this list.
- Whether any of these aspects are more or less important to customer satisfaction; explore reasons.
- Explore specific needs of particular customer groups in terms of adviser knowledge; outline reasons:
 - Disabled customers.
 - Lone parents – require advice on childcare issues.
 - Specific age groups (50+; 18-24; other) – need different advice at different ages.
 - Other.

SHOWCARD C: Job opportunities

- Explore views about the importance of **job opportunities** for customer satisfaction:
 - Whether this was felt to be a key factor for satisfaction; outline reasons.
 - Views about the different aspects of job opportunities, as outlined on the show card.

Quantity – large selection of opportunities.

Range – opportunities in a wide range of sectors and to suit a range of customer needs.

Quality and suitability – filtered by provider for suitability.

Up-to-date vacancies – regularly updated and current.

Ease of access – practically easy to access and communicated to customers proactively:

- Whether these cover all issues relating to job opportunities; anything missing/shouldn't be included in this list.
- Whether any of these aspects are more or less important to customer satisfaction; explore reasons.
- Explore specific needs of particular customer groups in terms of job opportunities; outline reasons:
 - Disabled customers.
 - Lone parents.
 - Specific age groups (50+; 18-24; other) – younger customers view the range of vacancies as particularly important.

- Other – made available using a range of mediums, including paper, for those who lack technical capabilities.

SHOWCARD D: Financial support

- Explore views about the importance of **financial support** for customer satisfaction:
 - Whether this was felt to be a key factor for satisfaction; outline reasons.
 - Views about the different aspects of financial support, as outlined on the show card.

Expenses – including travel costs, free stamps, clothes for interviews and other relevant costs:

- Whether these cover all issues relating to financial support; anything missing/shouldn't be included in this list.
- Whether any of these aspects are more or less important to customer satisfaction; explore reasons.
- Explore specific needs of particular customer groups in terms of financial support; outline reasons:
 - Disabled customers.
 - Lone parents – childcare costs.
 - Specific age groups (50+; 18-24; other).
 - Other.

SHOWCARD E: Skills development

- Explore views about the importance of **skills development** for customer satisfaction:
 - Whether this was felt to be a key factor for satisfaction; outline reasons.
 - Views about the different aspects of skills development, as outlined on the show card.

Training – increase employability through development of skills; confidence and social skills; long term; job specific.

Work placements – work experience; potential job opportunity:

- Whether these cover all issues relating to skills development; anything missing/shouldn't be included in this list.
- Whether any of these aspects are more or less important to customer satisfaction; explore reasons.

- Explore specific needs of particular customer groups in terms of skills development; outline reasons:
 - Disabled customers - training to develop confidence and motivation.
 - Lone parents.
 - Specific age groups (50+; 18-24; other) – younger customers favoured the opportunity to gain work experience; IT training for older customers.
 - Other.

SHOWCARD F: Location

- Explore views about the importance of **location** for customer satisfaction:
 - Whether this was felt to be a key factor for satisfaction; outline reasons.
 - Views about the different aspects of location, as outlined on the show card.

Accessibility of provider – reliance on public transport; travel costs; easy access; well connected or close; if given choice would they simply chose the closest office.

Location of employment opportunities – in local area; easily accessible by public transport:

- Whether these cover all issues relating to location; anything missing/ shouldn't be included in this list.
- Whether any of these aspects are more or less important to customer satisfaction; explore reasons.
- Explore specific needs of particular customer groups in terms of location; outline reasons:
 - Disabled customers – customers with more specific needs were willing to travel further for good support.
 - Lone parents – need convenient location.
 - Specific age groups (50+; 18-24; other).
 - Other.

SHOWCARD G: Facilities/environment

- Explore views about the importance of provider **facilities/environment** for customer satisfaction:
 - Whether this was felt to be a key factor for satisfaction; outline reasons.
 - Views about the different aspects of facilities/environment, as outlined on the show card.

Welcoming environment – offices should be clean, warm and comforting environment; friendly and welcoming with places to sit and 'hang out'.

Relaxed atmosphere – should be calm with not too many customers (no queues); easy access to adviser.

Sufficient computers

- Whether these cover all issues relating to facilities/environment; anything missing/shouldn't be included in this list.
- Whether any of these aspects are more or less important to customer satisfaction; explore reasons.
- Explore specific needs of particular customer groups in terms of facilities/environment; outline reasons:
 - Disabled customers – prefer ground floor.
 - Lone parents – child friendly environment.
 - Specific age groups (50+; 18-24; other).
 - Other.

Any other factors [NO SHOWCARD – DISCUSS AS A WHOLE GROUP]

- Explore whether there are **any other issues** participants feel are important for customer satisfaction not explored above.

Note to researcher: Refer participants back to list of spontaneous issues raised at the start of the workshop; in addition, ask participants to reflect on the discussions so far and consider whether there is anything missing that they feel is important for customer satisfaction:

- If necessary, probe re: feedback opportunities; impact of provision; outcome.
- For each new issue:
 - Explore reasons why this is important for customer satisfaction.
 - Whether there are specific needs for particular customer groups; outline reasons.
 - Disabled customers.
 - Lone parents.
 - Specific age groups (50+; 18-24; other).
 - Other.

Prioritising factors

- Prioritise **key factors** for customer satisfaction.

Note to researcher: Researcher to use cards [SHOWCARD H] and ask group to prioritise factors, considering their importance in terms of what customers need to know in order to make a choice between different providers. Researcher to create a list of priorities on wall/board to allow for easy reading during discussion.

- Explore relative importance of each of the factors considered so far, within the context of what customers would need to know to make a choice between different providers; outline reasons.
- Explore how views might vary according to different outcomes of the provision:
 - SCENARIO 1: If they found employment through this provider.
 - SCENARIO 2: If, upon completing the provision, they had not found a job and were referred back to JobcentrePlus.
- [Using ultimate list] Explore broader implications of prioritised factors:
 - Whether this list of priorities would be applicable to all providers.
 - Views about whether this list would be relevant to all service users; explore perceived variations between customer groups; outline views.

Choice and evaluation

Note to researcher: Explain to participants that, in the future, the Government would like to give customers key information about providers so that they can choose which provider they would like to go to for employment services. In addition to information about job outcomes, this would include what previous customers thought about each provider. In order to do this, DWP is now exploring how best to get customers to evaluate their provider experience.

- Explore views about 'choice' in **selecting a provider**:
 - Whether participant would like to choose which provider they could go to; perceived benefits/disadvantages of choice.
 - How they would make a choice; what are the key aspects they would consider [probe and explore if different from aspects outlined above].
 - Perceived impact of choice.
- Explore views about **presenting information** to enable customers to choose which provider would suit them best:
 - How to summarise information.
 - Level of depth of information required – sufficient to have just Star Rating with outcomes and customer satisfaction; or need to be broken down and explained.

- Explore views about **collecting information** about customer experiences:
 - Timing of collecting information.
 - Point of exit – would the result have an effect on their views (either sent back to Jobcentre Plus or finding employment).
 - More than one point.
 - Other.
 - Method of collecting information:
 - Postal survey – anonymous; flexible; can consider answers; filling in forms.
 - Online survey – lack of IT skills and equipment; completion at providers – confidentiality.
 - Phone survey – easy, lack of confidentiality.
 - Face-to-face survey – easy; ensures response.
 - Other.

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BMRB were commissioned by the Department for Work and Pensions (DWP) to research factors affecting customer experience of contracted employment provision. The purpose was to inform the development of a 'customer metric' to measure customer experience of contracted employment provision and provide a basis for customer choice between providers. The research consisted of: a scoping exercise to gather background information via desk research and stakeholder interviews: exploratory qualitative research with customers to identify key aspects of provision, which would be turned into descriptors for the metrics; and a testing phase for the descriptors identified, with customers, provider staff and key stakeholders via a series of workshops and focus groups.

The research identifies four key factors underpinning experience of contracted employment provision: adviser relationship; adviser knowledge; job opportunities; and skills development. Whilst the importance of these factors varies between different customer groups, taken together they will facilitate a simple, easy to use comparison between providers which provides useful information to the full range of customer groups. These factors align with the department's Customer Insight Key Drivers – ease of access, treatment, timely response and outcome – but reflect the specific needs of customers of contracted employment provision.

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