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EXECUTIVE SUMMARY

In this report we review the integrated Multi-channel practices of 12 different PES organisations. Hereby we focus on three main areas:

1. The overall strategy and mission;
2. The experiences and lessons regarding Multi-channel management; and
3. New developments in the area, such as self-help tools and social media.

The results show similarities in terms of goals (customer satisfaction and cost efficiency), but differences in terms of the strategies pursued to reach these goals. Few organisations have a truly integrated strategy. Many focus on keeping all channels open and some on the supplemental value of different channels.

To further develop e-government and multi-channelling it is important to bear the following in mind in order to achieve the best possible outcomes:

- To set targets that are measurable and steps to reach the goals;
- To include all (organisational) aspects going beyond channels or services; and
- To develop evaluation strategy that allows the measurement and benchmarking of progress.

The analysis carried out yields relevant lessons regarding MCM, noteworthy are the:

- Different aspects of staff training and education that are required;
- Necessity to have a digital divide strategy;
- Realisation that MCM requires additional resources (for development and ongoing support purposes) and does not necessarily lead to specific cost savings;
- Realisation that the introduction of new e-services requires additional work (support) in the other channels (mainly the telephone); and
- Notion that self-help tools (e.g. to assist profiling) are difficult to develop, often leading to more work and not to higher quality (due to more errors and control work).

New technologies and developments offer promising opportunities for the future. Relevant insights are:

- The use of Social Media generally leads to satisfied customers, but does not replace existing channels and (for now) seems to have no effect in terms of cost reductions
- Self-help tools reduce the burden of traditional channels in terms of service delivery, but do require a 'support role' for these channels to help ensure accuracy.
- Automatic vacancy-matching is highly complex (in terms of coding and finding the right criteria), but has a high potential in reducing the work load on the front-office and easily providing relevant job offers to clients.

This highlights the following lessons for the future:

1. It is important for multi-channelling approaches and missions to be coherent, setting out achievable, time specific and measureable goals.
2. It is good practice to involve customers in the development of approaches and to employ benchmarking to assess progress. Evaluation is best carried out using data beyond the measurement of the use of different channels.
3. Self-help tools can be useful, particularly when their outcomes are reliable and their use helps to reduce the workload of the front and back office without sacrificing quality of data.
4. Strong channel marketing strategies can help to steer users towards more effective and efficient channels.
5. It is important to take staff training and awareness-raising into account to help overcome any potential resistance to change.

1 INTRODUCTION

The PES to PES Dialogue programme focuses on mutual learning between PES to support them in continuously increasing service delivery capacity and effectiveness. A Peer Review event in June/July 2011 focussed on “Integrated Multi-channelling: combining e-services with personalised services in a customer-oriented and efficient way”. The rise of new service channels and the necessity (in many countries) to work more cost efficiently as well as to enhance customer orientation not only calls for reforms in PES organisations, but also for a review of the channel strategies used by PES organisations in the EU. Deploying the various channel strategies in a cost effective way while maintaining or increasing customer satisfaction is a challenging task. Learning from other organisations is a key method to gain insights into quick wins as well as the more fundamental changes required in the future.

In this paper the Multi-channel strategies of the countries and organisations participating in the Peer Review are compared¹. This comparison is guided by the following questions:

1. What is the overall strategy and mission in relation to Multi-channel management and what is the rationale behind the Multi-channel strategy?
2. What are the main managerial issues and lessons to be learned when implementing integrated MCM?
3. What are the benefits and lessons to be learned with respect to new developments (e.g. self-help tools and social media)?

The analysis is based on a limited inventory (gathered from 12 brief PES expert papers prepared for the Peer Review) of the strategies of the PES organisations and is intended to provide a general overview of approaches and lessons to be learnt. As the country contributions partly differ in length and focus, the PES experts participating in the Peer Review were asked to check the comparative paper and add information where needed. However, the picture is not complete for all PES for each issue. Therefore the paper aims to identify trends and to give some concrete examples, rather than presenting a full and detailed analysis of developments.

In chapter 2 we compare the strategies and missions of the various PES organisations. In chapter 3 we focus on the second research question and assess the channels used in different countries for different tasks and discuss the most important managerial issues. Chapter 4 is devoted to the lessons to be learned regarding new developments. We conclude in chapter 5 with the most important conclusions and recommendations.

1 In the report we compare the Multi-channel management practices from 12 PES organisations from 9 different EU countries: these include three PES from Belgium (VDAB for the Flemish region, Le FOREM for the Walloon region and Actiris for the Brussels region) and the PES from Austria, Bulgaria, Estonia, Finland, Germany, the Netherlands, Slovenia, Sweden and the UK. VDAB serves as the host organisation.

2 MULTI-CHANNELLING – KEY NOTIONS, GOALS AND GENERAL TRENDS

Multi-channel Management (MCM) is a means to achieve certain goals. We use the **following definition** of Multi-channel management (MCM):

“Multi-channel Management is the effective and efficient deployment of channels for the communication, interaction, transaction with and/or distribution of products/services to the client” (Teerling et al., 2007). Carefully managing the available channels for the interaction with certain client groups can impact on the effectiveness of service-delivery, as well as the efficiency of the service-delivery process. Ideally, the Multi-channel strategy is therefore based on a carefully described overall (service) mission and strategy. The differences in strategies may translate into different definitions and levels of integration and functions.

Regarding the MCM strategy being pursued, we follow the distinction made by Pieterse and Van Dijk (2006) of four different MCM strategies:

- **Parallel positioning:** Channels are positioned next to each other. Citizens are free to choose their channels and services are available through each channel.
- **Replacement positioning:** Channels can replace each other. The assumption is that channels can be superior or inferior to each other. Customers would prefer to use the best channel and therefore one channel would replace another (immediately or over time).
- **Supplemental positioning:** Channels have supplemental values; each channel has its own characteristics that make it suitable for certain types of services or client groups. Therefore, governments should offer services via the best suited channels.
- **Integrated positioning:** All channels are integrated in the entire service delivery process. This means that all services are offered via all channels, but that the strengths and weaknesses of channels are considered in their design. Citizens are guided to the ‘best²’ channels and channels seamlessly refer to each other.

Based on the definition above of Multi-channel management, the integrated positioning of channels and Pieterse (2009) of Multi-channelling, we can define integrated Multi-channel management as:

“Integrated Multi-channel Management is the effective and efficient deployment of multiple service channels within one public service delivery process or the use of different channels for different service delivery processes, whereby the different channels relate to each

2 The best channel in this context refers to that channel that, given its (communicative) characteristics, is best suited to provide information, communication or transactions. A more elaborate discussion of this will be presented in the analytical paper.

other, for the communication, interaction, transaction with and/or distribution of products/services to the client”.

An integrated Multi-channel strategy adopts a holistic view on MCM and offers (most) services via most channels while taking channel differences into account. Factors that need to be taken into account are:

- Service characteristics (e.g. complexity and ambiguity)
- Channel characteristics (e.g. speed, interactivity, number of cues)
- Personal characteristics (e.g. education, digital skills and SES)
- Organisational characteristic (e.g. structure and culture)
- Situational constraints (e.g. clients emotions and need for closure)
- External constraints (e.g. legal, political and technological)

A fully integrated strategy takes all these factors into account and adds to that a description of the steps that need to be taken to reach the organisational, service or Multi-channel goals.

The strategies mentioned above are ideal types, in practice a combination is often used. Classifying the strategies of the different PES helps in clarifying the differences between the organisations.

Regarding the function of the channel, a distinction is made between:

- **Primary channels:** Channels that are the 'centre' of the Multi-channel strategy. Very often this is the online channel. These are the channels used for the bulk of the service delivery.
- **Secondary channels:** These are channels that are being targeted for specific functions or services that are not being targeted by the primary channel.
- **Support channels:** The channels that serve as auxiliaries (help-desk) for other channels.

2.1. Overall Goals / Mission: service improvement is the main motivating factor

Most³ [11] organisations formulate some kind of mission or general strategy in relation to Multi-channelling, some PES [2] use a phrasing that resembles more of a general organisational mission (e.g. Belgium/Actiris: *“The mission of Actiris and its partners is to work towards adapted solutions that enhance the employer’s chances of finding the right*

3 Numbers between brackets [] indicate the number of PES.

employee and help the jobseeker to find the job that fits with his/her competences.” Others [8] formulate a goal or mission that directly aligns with MCM. Slovenia formulates the most concrete strategic goal: “all channels ensure the same quality of services and that the ESS users may use several channels to communicate with the ESS.”

Although the exact phrasing of the goals/mission varies from country, most goals boil down to one (or more) categories:

Goals according to the PES mission for Multi-channelling:

1. Improvement of service quality (Austria, Belgium/Le FOREM, Belgium/VDAB, Estonia, Germany, Slovenia, UK)
2. Improvement of service efficiency (Bulgaria, Belgium/Le FOREM, Belgium/VDAB, UK)
3. Increase in customer satisfaction (Belgium/Le FOREM, Germany, UK)
4. Cost reduction (Netherlands, UK)
5. Administrative simplification / reduction red tape (Belgium/Le FOREM, UK)
6. Improvement of (administrative) processes (Belgium/Actiris, Bulgaria, Sweden)
7. Improve availability and/or accessibility of services (Belgium/Le FOREM, Slovenia)

This overview clearly shows that **the improvement of service quality is the leading goal** in MCM. **The reduction of costs** is something that is also being hoped for by some PES [4] - through the improvement of efficiency - as a side-effect. Only the UK and the Netherlands make this a focal point of the MCM strategy. However, although these are perhaps the most important, these are not the only goals in these countries. The **Netherlands consider cost reduction a key factor** in developing the e-channel to a full service channel in order to replace the face-to-face channel as the primary channel for service delivery by 2014.

Most PES want to achieve both goals, and consider them to be complementary (e.g. simplification and efficiency). In practice, the combination of these goals can lead to conflicts as they can be difficult to reach simultaneously. For example, if a PES aims both at ensuring the same quality for each channel, freedom of channel choice as well as lowering the costs of service delivery, this will be difficult to achieve, particularly at the outset, when there are development costs of online applications. A combination of such goals requires a very sophisticated channel development, steering and marketing strategy and a view of development costs and timescales.

Table 1: Overall strategy and mission⁴

	Overall (service/MCM) mission ¹ .	MCM strategy followed	Function of face-to-face services?	Function of call centres?	Function of online services?
Austria	Increase added-value; Free resources for personal interaction; Early-intervention	Integrated	Limited as possible	Support	Primary channel
Belgium/ Actiris	Helping employers find employees and employees find the right job.	Parallel	Primary	Secondary	Secondary
Belgium/ Le FOREM	Administrative simplification; Equality of opportunity; Improve service-delivery (nimble, faster, pro-active)	Replacement	Secondary	Primary	Primary
Belgium/ VDAB	Offer different avenues of communication; Make channels more effective and efficient; Increase transparency of labour market	Parallel in FO Integrated in BO	Primary	Primary	Primary
Bulgaria	Improve efficiency and effectiveness of service-delivery	Supplemental	Primary	?	Secondary
Estonia	Improve quality of service delivery, accessibility and user-friendliness.	Integrated	Primary	Primary	Primary (preferred)
Finland	Shift from parallel strategy towards integrated MCM.	Integrated	?	Secondary, Support	Primary (standard services and information)
Germany	Increase in customer satisfaction; Higher service quality	Supplemental/Parallel	Secondary	Secondary	Primary
Netherlands	Cost reduction; "full service digital platform in 2014 for 90% of our clients."	Replacement (parallel until 2014)	Limited as possible, supplemental when necessary	Secondary, Support	Primary
Slovenia	<i>Strategic:</i> All channels are the same quality users may use several channels. <i>Additional:</i> Better availability and accessibility. Lower costs, more time and staff for personal contact. Free choice of channel.	Parallel	Primary	Primary	Primary
Sweden	"Provide our clients with the services they need in order to carry out their process to find a job or to recruit as fast and as successfully as possible."	Supplemental	?	?	?
UK	Increased efficiency and greater customer satisfaction	Supplemental	Primary for certain services	Supports online channel	Primary for most (general) services

⁴ The table represents an interpretation of the information provided by the PES organisations. Question marks indicate that no interpretation could be made based on the information provided.

2.2 PES and channel strategies: between replacement and integrated strategies

In line with the analysis of the missions, only one PES (the Netherlands) focuses (mainly) on the replacement of the traditional service channels with online services. It is important to note that the Netherlands uses integration to reach replacement. In this process, services are developed step by step and transformation from one channel to another is realised.

Other organisations [4 PES] follow a supplemental strategy where certain channels are used for certain services.

The central theme of this comparison is integrated Multi-channelling. Up to now there appears to be no shared understanding of what integrated Multi-channelling means. Many PES mention the concept “integration” (or integrated), but the interpretation of the concept varies. Some see integration as keeping all channels open next to one another (e.g. Slovenia), some see integration as the offer of separate channels connected to one (integrated) back-office (e.g. Belgium/VDAB), whereas others focus on the integration of channels in the front-office as well as back-office integration (e.g. Austria).

According to the definition of the various MCM strategies above, integration refers to a holistic approach towards the channels in both the front-office and back-office.⁵ When the various strategies of the different organisations are plotted on the typology described above **the true level of integration, for now, seems low**. To judge from the contributions three PES follow a (truly) integrated channel strategy (Austria, Estonia and Finland), while Austria has in this respect, the most elaborated strategy.

The Austrian PES has a product-channel matrix in which they define what service to offer via which channel (e.g. counselling is done face to face and job placement is done online). Furthermore, the organisation has a gender and diversity approach and; *“AMS has the aim to develop the organisation, connect tools, processes and channels and improve service delivery standards. There is definitely no aim to reduce staff.”* Involving customers in the development is an important approach.

For other PES which themselves indicate having an integrated approach to the channels, these appear to be currently positioned more as equals in a parallel strategy.

⁵ The analytical paper will discuss the characteristics and pro's and cons of each strategy in more detail.

2.3 Primary and secondary channels in the overall strategy

As with the MCM strategy pursued, the PES organisations differ in the functions they assign to the different channels. As seen in Table 1, broadly, three groups of countries can be distinguished:

1. All channels as primary channels

The first group consist of the PES that follow a parallel channel strategy and see all channels as equal (e.g. Belgium/VDAB, Estonia, and Slovenia).

2. One channel as primary channel – mostly online services

The second group consists of the organisations that see one channel as the main (primary) channel and state that certain (but fewer) types of services will be offered via other (secondary) channels (Belgium/Le FOREM, Bulgaria, Germany, Finland, UK (partly)). In most cases the online channels are the primary channels and certain (complex) services are being dealt with via the traditional (personal) service channels. The exception is Bulgaria where the face to face channel is still being regarded as the most important channel, with a secondary role for online channels and kiosks.

The third group comprise PES who focus primarily on one channel (in all cases the online channel) and foresee that other channels will fulfil an auxiliary role as support (or help-desk) for online services (Austria, Finland, Netherlands, UK (in part)).

2.4 For most PES integrated multi-channelling is a challenge for the future

An important aspect is the development of channel strategies in terms of management processes. This implies, in fact, two aspects: 1) does the strategy comprise a plan of steps to be undertaken in a given period of time and 2) an indication of the progress and its measurement.

As far as actual development is concerned, we can divide organisations into three groups

1. PES with an advanced integrated Multi-channelling strategy

This group comprises PES that are well under way with the execution of their programmes, have defined and reached certain milestones and have (when necessary) made adjustments based on some kind of evaluation and have progressed further with integration, for example Austria, Finland, UK.

What separates these organisations from the others is that they formulated specific goals that are attainable within a foreseeable time period instead of setting general ambiguous goals that are not very concrete or measurable. Furthermore, they have been working on the matter for several years and thus made (some) progress, and have measured this progress (or at least carried out some form of evaluation) and have adjusted their plan (where necessary) based on the findings.

2. PES with intermediate stages of programme development and execution

These PES organisations have defined a mission and have begun carrying out their programmes. Examples include PES in Belgium/Actiris, Belgium/Le FOREM, Belgium/VDAB, Estonia, Finland, Germany, the Netherlands and Slovenia.

3. PES at an early stage of setting up a MCM *strategy*,

These are the organisations that plan to implement (integrated) MCM in the near future (for example Bulgaria).

2.5 Implementation and change management: The important role of “soft factors”

Realising integrated MCM is a complex process that entails not only the implementation of new (technological) tools (e.g. a new website), but very often requires changes in the structure of the organisation and processes, a change of culture, the improvement of communication practices, and so on.

Research⁶ shows that organisations working on MCM experience that **the more 'soft' factors (e.g. cultural change) form the most important obstacles** towards successful MCM. This leads to the notion that the scope of good (integrated) MCM needs to be broad, rather than narrow and encompass not only the introduction of a 'new website' but requires a wide range of factors to be included in organisational change processes (organisational, personal, technological, financial, external, etc.).⁷

According to the scope for implementation of a multi-channel strategy we classify PES in three groups based upon the country contributions:

1. PES with a broad implementation strategy for MC

An example of a PES with a broad scope MCM implementation is the Netherlands. This organisation is implementing *Redesign 2014* - a reorganisation of the whole organisation due to the paradigm change the PES is making (towards e-services). The PES aims to assist clients primarily via the online channel, supplemented with face to face services for specific groups. The redesign affects all aspects of the organisation, staff, offices and service levels for clients via all channels. Even legislation has to be changed to make the new organisational and service structure possible.

Other PES showing a comprehensive implementation strategy are Austria, Finland, Germany, and the UK. The Austrian (AMS) mission statement illustrates this:

“Our goal is to develop a concerted use of different service delivery channels of the AMS. The handling of customer-related processes by means of e-services, supported by telephones, should be enabled as far as possible through optimal

6 This research is discussed in the analytical paper

7 We will elaborate on this further in the analytical paper.

utilization of the self-help potential of our customers. The personal contact in the office should be limited as far as possible for agreed appointments due to defined care and counselling needs and administrative requirements.

Thus the added-value of AMS should be increased and resources for demanding personal services can be obtained. The objective of early intervention is further maintained.”

2. PES with a medium scope for their implementation strategy

Such strategies include several relevant factors, but not all. Belgium/Actiris serves as an example. This PES had a reorganisation from centralized to decentralized services. For the moment every community in Brussels has its proper local office. Along with that, all channels have been revised and reorganized (increase of call centre services and internet services through MonActiris).

3. PES with a narrow scope for their implementation strategy

Examples in this category are PES which focus on the implementation of a new tool or changing a limited set of factors in relation to channel approaches, typically countries starting to build up multi-channelling like Bulgaria. This country only mentions the implementation of a data-base in the back-office as well as the introduction of several self-service kiosks for job seekers.

3 MULTI-CHANNELLING: SERVICES FOR JOBSEEKERS AND EMPLOYERS

In this chapter we focus on the actual implementation of (integrated) MCM as well as the main managerial issues that PES organisations encounter. Firstly we discuss what services PES organisations supply to job seekers and employers and how these client groups are supposed to interact with the PES organisations. Secondly, we discuss the main managerial issues in the introduction of MCM. Finally, we focus on the strategy of each of the PES organisations.

3.1 Overall service delivery: Current predominance of face-to-face services

Figure 1 below clearly shows that the face-to-face channel is the most frequently used channel in most PES (hence the most “mature” channel). All 12 organisations offer 7 out of 9 services via this channel.

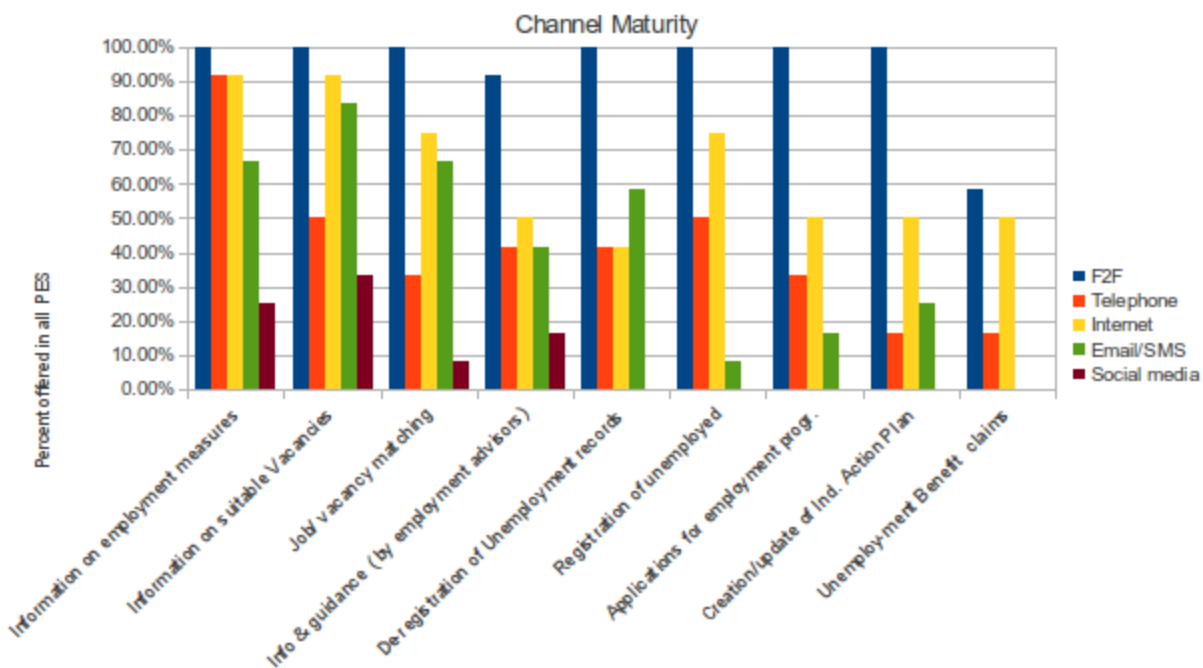


Figure 1: Channel maturity: the number of services supplied per channel

The Internet (website) is the second most mature channel, followed by the telephone and e-mail/SMS. Social media are hardly being deployed. The Netherlands, Sweden and UK offer information on vacancies via social media. The picture of service distribution per channel slightly varies across the range of concrete services offered:

- Strong role of face-to-face services (90 – 100 % of PES offer the service by this channel):
 - Information on employment measures
 - Information on suitable vacancies
 - Job vacancy matching
 - Info and guidance by employment advisors
 - Registration of unemployed
 - Deregistration of unemployment records
 - Application for employment programmes
 - Creation / update of individual action plan
- Strong role of internet (70 % and more PES offer the service by this channel)
 - Information on employment measures
 - Information on suitable vacancies
 - (Job vacancy matching)
 - (Registration of unemployed)
- Strong role of telephone (50 % or more PES offer the service by this channel)
 - Information on employment measures
 - Information on suitable vacancies
 - Registration of unemployed

3.2 Services for jobseekers: Complex services are often delivered through only one channel

The PES contributions give an overview of all services offered to jobseekers which allows some judgements about which channels are used for which services (see Table 2 below):

- Information related services are relatively often offered via the website
- Registration and self-help tools (e.g. for profiling) are relatively often offered via the telephone and e-mail.
- The face to face channel predominates for most services right now.

- Relatively 'simple' services (information) are very often provided through more channels, whereas more complex services (e.g. vacancy matching) are delivered through one channel (often Face to Face). One reason could be the investments required to offer services via more channels

Moreover MCM strategies appear to strongly differ. Germany for example offers most services via most channels, whereas Austria offers certain services via certain channels. This country, for example, uses the telephone for a limited set of services (mostly in relation to information), whereas Germany also provides more transaction based services via the telephone.

With regard to **steering of jobseekers to certain channels** most PES organisation follow similar strategies here (see the overview in Table 4). In line with the customer centrality focus in the MCM strategy, most PES promote freedom of channel choice for their clients [8]. However, despite this focus, most PES follow some kind of steering policy to persuade the client to use the online channel (6 out of 8 PES).

However a significant number of PES steer (a segment of) their clients to a certain channel given a certain task or situation.

The **strategies followed in steering clients** to a certain channel vary in different PES.

- Most countries/organisations **gently or 'softly'** point citizens towards the use of one or the other channel through the use of different communication tools.
- Finland and Germany are among the few countries that **seek to encourage clients more strongly** to use the electronic channels. The key differences here are twofold. The first is that Finland (as well as Germany) not only uses stronger means to induce behavioural change (e.g. enforcement), but also that they rely on a mix of steering instruments instead of one. Research on this field suggests that this is a more effective approach.

Finland works with the following tools: *“We have the following methods to try to increase the use of online services: We have just started comprehensive staff training, local offices are teaching job seekers and employers and there will be a nationwide marketing campaign in September.”* These tools are connected to a concrete target: *“Achieving X % of registrations made via Internet”*. This is a good example on how to design a steering strategy as part of a (integrated) MCM strategy. Belgium/Le FOREM is an example of an organisation that has also set these concrete and measurable targets.

Other PES make particular efforts to better cope with the digital divide. They have developed approaches how to better support people with less digital skills:

- The Slovenian strategy to account for individual lacking sufficient digital literacy offers a combination of a) free computer access, b) motivational communication, c) education and d) face-to-face back up.

- The strategy from the UK to use third parties (partner organisations) to support people with skills or access difficulties. Given the notion that using opinion leaders and communication networks to interact with clients is increasing in importance (also due to the rise of *networked* media (web2.0, social media), this seems a promising direction to ensure that both customer satisfaction and organisational efficiency can be attained.

3.3 Services for employers: More online services and more steering

Whereas the participating PES use widely varying strategies for the contacts with employees, they are remarkably unified in their strategies towards employers (see table 3).

Most [8] organisations clearly position the online channel as the preferred channel.

So far, the experience with pushing employers to the electronic channel seems successful in most countries. Experiences in the Netherlands, for example, show that employers prefer the online channel and started to use this channel autonomously.

Other PES organisations facilitate self-help services by offering (some) employers and/or intermediaries direct access to the databases in their back-office. This implies that these employers and/or intermediaries interact with the PES directly, without the use of any communication channel. For example in Sweden, some employers have direct access to the database via xml-files. As a result 85-90 % of the vacancies are registered by employers themselves. This strategy bypasses the front-office entirely and is therefore a possibility to realise efficiency gains, reduce errors and improve the speed of administrative handling.

Table 2: supply of services to job seekers

		Registration of unemployed	De-registration	Unemployment Benefit claims	Creation/update of Individual Action Plan	Information on suitable Job Vacancies etc.	Information and guidance	Information on employment measures	Applications/referrals to/for employment programmes	Job/ vacancy matching
Austria	F2F	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Telephone	No	Yes	No	No	No	Yes	Yes	No	No
	Internet	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Email/SMS	No	Yes	No	No	Yes	Yes	Yes	No	Yes
	Social media	No	No	No	No	No	No	No	No	No
Belgium/Actiris	F2F	Yes	Yes	n/a.	Yes	Yes	Yes	Yes	Yes	Yes
	Telephone	Yes	No	No	No	No	No	Yes	Yes	No
	Internet	Yes	No	No	No	No	Yes	Yes	No	No
	Email/SMS	No	No	No	No	Yes	No	No	No	No
	Social media	No	No	No	No	No	No	No	No	No
Belgium/Le FOREM	F2F	Yes	Yes	?	Yes	Yes	Yes	Yes	Yes	Yes
	Telephone	Yes	No	?	No	Yes	Yes	Yes	Yes	No
	Internet	Yes	No	?	Yes	Yes	Yes	Yes	Yes	Yes
	Email/SMS	No	Yes	?	No	Yes	Yes	No	No	Yes
	Social media	No	No	?	No	Yes	Yes	Yes	No	No
Belgium/VD AB	F2F	Yes	Yes	n/a.	Yes	Yes	Yes	Yes	Yes	Yes
	Telephone	Yes	Yes	n/a.	No	Yes	No	Yes	Yes	No
	Internet	Yes	Yes	n/a.	No	Yes	No	Yes	Yes	Yes
	Email/SMS	No	No	n/a.	No	Yes	No	No	No	Yes
	Social media	No	No	n/a.	No	No	No	No	No	No
Bulgaria	F2F	Yes	Yes	n/a.	Yes	Yes	Yes	Yes	Yes	Yes
	Telephone	No	No	n/a.	No	No	No	No	No	No
	Internet	No	No	n/a.	No	Yes	No	Yes	Yes	No

		Registration of unemployed	De-registration	Unemployment Benefit claims	Creation/update of Individual Action Plan	Information on suitable Job Vacancies etc.	Information and guidance	Information on employment measures	Applications/referrals to/for employment programmes	Job/ vacancy matching
	Email/SMS	No	Yes	n/a.	No	No	No	No	No	No
	Social media	No	No	n/a.	No	No	No	No	No	No
Estonia	F2F	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Telephone	No	No	No	No	No	No	Yes	No	No
	Internet	No	Yes	No	Yes	Yes	Yes	Yes	No	Yes
	Email/SMS	No	No	No	No	Yes	No	Yes	No	Yes
	Social media	No	No	No	No	No	No	Yes	No	No
Finland	F2F	Yes	Yes	Yes	Yes	Yes	?	Yes	Yes	Yes
	Telephone	No	No	No	No	Yes	?	Yes	No	Yes
	Internet	Yes	Yes	Yes	No	Yes	?	Yes	No	Yes
	Email/SMS	No	Yes	?	Yes	Yes	?	Yes	No	Yes
	Social media	No	No	?	No	No	?	?	No	No
Germany	F2F	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Telephone	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Internet	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Email/SMS	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes
	Social media	No	No	No	No	No	No	No	No	No
Netherlands	F2F	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Telephone	No	No	No	No	No	Yes	Yes	No	No
	Internet	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Email/SMS	No	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes
	Social media	No	No	No	No	Yes	Yes	No	No	Yes
Slovenia	F2F	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Telephone	No	No	No	No	No	No	Yes	No	No
	Internet	Yes	No	Yes	No	Yes	Yes	Yes	No	No

		Registration of unemployed	De-registration	Unemployment Benefit claims	Creation/update of Individual Action Plan	Information on suitable Job Vacancies etc.	Information and guidance	Information on employment measures	Applications/referrals to/for employment programmes	Job/ vacancy matching
	Email/SMS	No	No	No	No	Yes	Yes	Yes	Yes	No
	Social media	No	No	No	No	No	No	No	No	No
Sweden	F2F	Yes	Yes	?	Yes	Yes	Yes	Yes	Yes	Yes
	Telephone	Yes	Yes	?	Yes	Yes	Yes	Yes	No	Yes
	Internet	Yes	No	?	Yes	Yes	?	Yes	No	Yes
	Email/SMS	No	Yes	?	Yes	Yes	?	Yes	No	Yes
	Social media	No	No	?	No	Yes	?	Yes	No	No
UK	F2F	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Telephone	Yes	Yes	Yes	No	Yes	No	Yes	No	Yes
	Internet	No	No	Yes	No	Yes	No	Yes	No	Yes
	Email/SMS	No	No	No	No	No	No	Yes	No	No
	Social media	No	No	No	No	Yes	No	No	No	No

Table 3: supply of services to employers

		Registration/ intake of Job Vacancy	Follow up of PES handling Vacancy	Establishment contacts jobseekers	Labour market information	Info on employment measures	Data exchange on participant in LMP
Austria	F2F	Yes	Yes	Yes	Yes	Yes	Yes
	Telephone	No	No	Yes	No	Yes	No
	Internet	Yes	Yes	Yes	Yes	Yes	Yes
	Email/SMS	Yes	Yes	Yes	Yes	Yes	Yes
	Social media	No	No	No	No	No	No
Belgium/Actiris	F2F	Yes	Yes	Yes	Yes	Yes	No
	Telephone	Yes	Yes	No	Yes	Yes	No
	Internet	Yes	Yes	Yes	Yes	Yes	Yes
	Email/SMS	Yes	No	Yes	No	Yes	No
	Social media	No	No	No	No	No	No
Belgium/Le FOREM	F2F	No	No	Yes	Yes	Yes	Yes
	Telephone	No	No	Yes	No	No	No
	Internet	Yes	Yes	Yes	Yes	Yes	No
	Email/SMS	Yes	Yes	Yes	No	Yes	Yes
	Social media	No	No	Yes	Yes	Yes	No
Belgium/VDAB	F2F	Yes	Yes	Yes	No	Yes	Yes
	Telephone	Yes	Yes	No	No	Yes	Yes
	Internet	Yes	Yes	Yes	Yes	Yes	Yes
	Email/SMS	Yes	Yes	Yes	No	No	No
	Social media	No	No	No	Yes	Yes	No
Bulgaria	F2F	Yes	Yes	Yes	Yes	Yes	Yes
	Telephone	No	No	No	No	No	No
	Internet	Yes	Yes	No	Yes	Yes	Yes
	Email/SMS	Yes	No	No	No	No	No
	Social media	No	No	No	No	No	No
Estonia	F2F	Yes	Yes	Yes	No	No	No
	Telephone	No	No	No	Yes	Yes	No
	Internet	Yes	Yes	Yes	Yes	Yes	No
	Email/SMS	Yes	Yes	Yes	Yes	Yes	Yes
	Social media	No	No	No	Yes	Yes	No

		Registration/ intake of Job Vacancy	Follow up of PES handling Vacancy	Establishment contacts jobseekers	Labour market information	Info on employment measures	Data exchange on participant in LMP
Finland	F2F	Yes	Yes	Yes	Yes	Yes	No
	Telephone	No	Yes	No	Yes	Yes	Yes
	Internet	Yes	No	Yes	Yes	Yes	Yes
	Email/SMS	Yes	No	No	No	No	No
	Social media	No	No	No	No	No	No
Germany	F2F	Yes	Yes	Yes	Yes	Yes	Yes
	Telephone	Yes	Yes	Yes	Yes	Yes	Yes
	Internet	Yes	Yes	Yes	Yes	Yes	Yes
	Email/SMS	Yes	Yes	Yes	Yes	Yes	No
	Social media	No	No	No	No	No	No
Netherlands	F2F	Yes	Yes	Yes	Yes	Yes	?
	Telephone	Yes	No	No	No	Yes	?
	Internet	Yes	Yes	Yes	Yes	Yes	Yes
	Email/SMS	Yes	Yes	Yes	Yes	Yes	Yes
	Social media	No	No	No	No	No	No
Slovenia	F2F	Yes	Yes	Yes	Yes	Yes	Yes
	Telephone	No	No	No	No	Yes	No
	Internet	Yes	Yes	Yes	Yes	Yes	Yes
	Email/SMS	No	No	No	No	Yes	No
	Social media	No	No	No	No	No	No
Sweden	F2F	Yes	Yes	Yes	Yes	Yes	No
	Telephone	Yes	Yes	Yes	Yes	Yes	No
	Internet	Yes	No	Yes	Yes	Yes	No
	Email/SMS	Yes	Yes	Yes	Yes	Yes	No
	Social media	No	No	No	No	Yes	No
UK	F2F	?	?	?	?	?	?
	Telephone	?	?	?	?	?	?
	Internet	?	?	?	?	?	?
	Email/SMS	?	?	?	?	?	?
	Social media	?	?	?	?	?	?

Table 4: Channel strategies for employees and employers.

	How are employers expected to engage with the various channels and services?	How are job-seekers expected to engage with the various channels and services?
Austria	<ul style="list-style-type: none"> > Online channel (Through the eAMS-account) > No specific differentiation, but difference in the intensity of support. 	<ul style="list-style-type: none"> > Freedom of choice > Steering of channel choice to the right channel.
Belgium/ Actiris	<ul style="list-style-type: none"> > Freedom of choice 	<ul style="list-style-type: none"> > Freedom of choice > 'Soft' steering to online channel
Belgium/ Le FOREM	<ul style="list-style-type: none"> > Online channel (compulsory in most cases) 	<ul style="list-style-type: none"> > Active but 'soft' steering to online and telephone channel (from F2F)
Belgium/ VDAB	<ul style="list-style-type: none"> > Online channel first > Large companies, private agencies and commercial job boards can exchange vacancies via hr.xml. (direct input in back-office) > Active steering by account managers to online channel 	<ul style="list-style-type: none"> > Freedom of choice > 'soft' steering to online channel
Bulgaria	<ul style="list-style-type: none"> > Online channel first > Active steering to online channel. 	<ul style="list-style-type: none"> > Freedom of choice > Active but 'soft' steering to online channel
Estonia	<ul style="list-style-type: none"> > Freedom of choice > Active steering to online channel. 	<ul style="list-style-type: none"> > Mandatory use of F2F for registration > Soft steering to self-service portal - for looking for vacancies and job application > Active but 'soft' steering to phone and F2F (and Skype) for general information.
Finland	<ul style="list-style-type: none"> > Online channel first. Employers are basically expected to register their vacancies into our Vacancy database themselves. > F2F and phone for contacts between employers. 	<ul style="list-style-type: none"> > Freedom of choice, but active steering to online channels > In some areas the use of online channels is high (90% of vacancies have been registered via the Internet and 70 % of labour market training applications have been sent via the Internet)
Germany	<ul style="list-style-type: none"> > Freedom of choice > BA offers an individual contact person to each enterprise. > No steering 	<ul style="list-style-type: none"> > Freedom of choice in most cases > Mandatory use of online channel for companies with a high amount of vacancies (through agreements). > Active but 'soft' steering to online channel
Netherlands	<ul style="list-style-type: none"> > Online channel first > No steering needed, due to preference online channels. 	<ul style="list-style-type: none"> > Active but 'soft' steering to call centres for information and general advice and to online channels for registration and application.
Slovenia	<ul style="list-style-type: none"> > Online channel first (compulsory for certain services) > Steering to online channel. > Phone for support. 	<ul style="list-style-type: none"> > Freedom of choice > Active steering to most efficient channels. > e.g. Jobseekers with low risk to become long-term unemployed are actively steered to use the self-service channels. > Elaborate digital divide strategy
Sweden	<ul style="list-style-type: none"> > Online channel first. Most employers register their vacancies into the vacancy database 	<ul style="list-style-type: none"> > Freedom of choice > Active steering to most certain channels for certain services in certain situations > e.g. job-seekers who already have a job, but are looking for a new one, will be directed to our on-line services or our call centres.
UK	<ul style="list-style-type: none"> > Online channel first > Phone for support. 	<ul style="list-style-type: none"> > strong focus on online channels. > work with third parties for clients with low internet access/skills > telephone and F2F as last resort.

4 NEW DEVELOPMENTS; THE LATEST TRENDS IN MCM

Various trends and developments in the field of MCM impact the future of PES. In this section the most important of these developments are discussed:

- Individual profiling through technology
- Use of E-books for jobseekers
- Automatic vacancy matching
- Self-Help tools
- Social media

4.1 Profiling by statistical self-help tools as exception

To judge from 12 PES contributions assessment and profiling are mostly delivered by face-to-face interviewing. Advanced IT based user profiling and segmentation are not widely applied within the various PES. Most PES [5] judge the personal situation of a job seeker in person, based on an (electronic) intake. This does not imply that the profiling is done purely intuitively:

- The German PES for example bases their face to face profiling on an extensive set of variables: “Match results on vacancies, education, competencies, job opportunities, activities for finding an occupation”.

The only country in our limited sample applying **advanced profiling** through IT is Finland.

- In the Finnish PES profiling is done using a statistical model. Profiling here is part of the PES customer service data system. The Netherlands indicate that they have a profiling system under development.

4.2 Increasing use of E-books for jobseekers as innovative development

Five PES have some kind of e-book (as shown in Table 5). By e-book, we mean an electronic application that allows clients and/or the PES organisation to record personal data of the client. In all cases this is a **personal web-page** where a job-seeker can monitor (parts of) their file, see vacancies and/or apply for jobs. Three other PES indicate that they are working on similar tools.

4.3 Automatic vacancy matching – limited use, but promising for the future

The role of automatic vacancy matching seems limited. Four PES organisations mention the use of automatic matching:

- .Belgium/Actiris has a sophisticated system that matches vacancies automatically based on professional skills, language skills and labour conditions. Every day the employer receives the top 10 matches. This is similar to the system used in the Netherlands (werkm@p).
- The UK has an automatic matching system under development. These are all rather similar tools, aimed at matching the characteristics of the job-seeker with certain vacancies.
- Experiences of for example Estonia show that more than half of all vacancies entered are being matched automatically to (a) job seeker(s).

Given this result and the general levels of satisfaction reported by most PES, this tool bears a promise to reduce workload (costs) and improve service quality. The most important challenge is to a) find the right matching criteria, b) make sure all users understand and apply these matching criteria. There is tension between the level of detail required to match properly (more detail equals better matching) and the level of detail and the complexity for the user (more detail equals higher complexity).

Table 5: New tools and developments

	Linkage of profiling and segmentation to Multi-channelling?	Presence of an 'e-book'	Automatic vacancy matching.
Austria	> Interactions are personalised based on the counselling-contract and the eAMS-account.	> eAMS-account > All activities are documented within this tool.	?
Belgium/ Actiris	> Personalised interaction (F2F) based on online registration. Criteria used are age and education. There is a pilot on advanced profiling.	> Yes, in "MonActiris" the jobseeker can complete his profile (studies, experience, language, etc.). These data can be exported in an automatic CV.	> Automatic vacancy matching via professional code, language skills and labour conditions. Every day the employer receives the top 10 matches.
Belgium/ Le FOREM	> Based on the action plan, the jobseeker receives individualized support.	> Yes, online. The user can save search, do vacancies matching, save training opportunities, upload CV, get access to his profile.	> Yes, for both companies and job-seekers
Belgium/ VDAB	> Based on the registration, the jobseeker receives personal advice.	?	> Automatic matching via Elise software based on various criteria. Jobindicator is being used to follow-up the process. Introduced in 2002. Number of mismatches decreased due to experience.
Bulgaria	?	?	?
Estonia	No	> an e-diary (job-search diary) (compulsory) used to monitor the job seeker's activities.	> Structured data is being used to match vacancies to job-seekers.
Finland	> Profiling is done based on a statistical model. Part of the PES customer service data system. > Not linked directly with Multi-channelling, however it is one source of information to decide on the appropriate customer segment.	> No, but planned	?
Germany	> Personalised (F2F) profiling based on several variables (e.g. education, competencies, Job opportunities, activities for finding an occupation)	> Sort of, an 'integration agreement' is defined together between counsellor and customer as an action plan. Can be seen and altered online.	?
Netherlands	> Profiling at the start is now based on the client's choice of registration channel. Digital registration activates digital services via e-book. After 3 months further profiling takes place in a face to face contact.	> Yes, digital platform "werk@p" for jobseekers Clients can respond to tasks, use a save mailbox, check profile and share docs and information with the advisor. Information directly registered in monitoring system is shared via an interface.	> Based on the clients' profile, automatic matching is directly provided through the Werk@p e-book tool.
Slovenia	> Through profiling at the registration, clients are assigned to a segment. > Each segment is steered to another channel.	> My Local Office, an individualized e-portal for jobseekers and registered unemployed that offers various e-services and e-cooperation between an identified user and ESS counsellor.	?
Sweden	> No structure profiling	> No, but planned	?
UK	> Loosely segmentations to identify what support they need. This segmentation will be based on a 'customer profile' that takes into account a basket of indicators including their attitude to work, digital capability and social circumstance.	> No	> We plan, from early 2012, to improve the experience of employers and jobseekers by introducing automated job matching capabilities;

4.4 Self-help tools - pros and cons, portals on the rise

Self-help tools are tools that a client can use to obtain services or information without (face to face) intervention of the PES organisation. An important (potential) benefit is that (in most cases) no contact is required and therefore the cost of service-delivery could decline. A downside is that the PES have less influence in monitoring and altering clients' behaviour. Another downside is that the information entered by the client might be less reliable than information entered by the organisations (e.g. due to differences in interpretation).

Finally, self-help tools typically require help or support functionality, which might - for example - change the role of the call-centre (from service channel to customer support channel) or the work of employment advisors who have to be able to integrate these tools into the process. Therefore, the use of self-help tools should be carefully considered and based on a judgement regarding their specific usefulness.

Table 6 gives an overview of the self-help tools that are currently being used within the various PES. In total 14 tools have been reported. Besides automatic vacancy matching (discussed above), most initiatives relate to the introduction of some kind of **portal** (aimed at jobs, careers and/or personal development) [5]. The final group consists of a number of smaller tools that are aimed at improving service-delivery or organisation effectiveness. Bulgaria, for example introduces Kiosks to help clients use online services. Another noteworthy example is the Swedish initiative regarding a virtual working environment:

“We are also working on developing virtual employment services. The concept is to combine self-help services with staff-delivered services online. We have, for example, launched an application directed at those who are new in the labour market which provides information on the possibilities and regulations that are important to be aware of. You can choose between different languages, and connected to this application, is a chat room where you can ask the questions that arise in relation to the information. You can also use different languages in the chat room. The chat is managed by staff at our call centre.”

Table 6: Self-help tools

	Name of self-help tool	Description ¹	Targeting and/or promotion ²	Monitoring and evaluation ³	Implementation ⁴	What have been the challenges for implementation?	What have been the success factors for implementation?
Austria	EAMS-Konto (portal)	> 4 services brought together in one tool: - Placement - Unemployment benefits - Training - Employment permits for foreign workers Many services can now be dealt with online.	> Employees > Employers	> Surveys show an above average level of satisfaction. > 30% of all clients use it. > Intermediate evaluation shows higher placement rates.	> Step-by-step, based on willingness of clients > Focus groups are used to guide the process.		> Voluntariness at first > Clear specifications and objectives > Lot of analysis/research > Possibility to give feedback
Belgium/ Actiris	Automatic Vacancy Matching via MonActiris	> Matching of vacancies to jobseekers characteristics based on various criteria.	> Employers with an MonActiris account.	> Under development > Success difficult to objectify	> Developed by IT dept > Back-office employees were trained	> Accurate logging (use of correct codes)	> In MonActiris there are templates of CVs the jobseeker can use, a tool that helps them to write a motivation letter, a test to measure their comprehension of job seeking, a questionnaire that helps them to find out if they can benefit claims, etc.
Belgium/ Le FOREM	A pilot for Remote Monitoring Support for Jobseekers	> Jobseekers' info is being logged in the BO and used for follow-up action.	> People <25yrs old with secondary levels of education > Le FOREM advisors	> Qualitative measurement > All actors were satisfied	> Pilot for young people	> Organizational/ cultural: Support for the advisors,	> Technology: the accumulation and pooling of information on jobseeker monitoring within back-office tools
	The 'Employment Horizons' platform (portal)	> Based on the occupation, the employee can find targeted information online.	> Jobseekers, workers, sectors of activity and training partners	> No. hits used as indicators > Positive feedback > Feedback higher when people have experience with systematically	?	> Organizational/ cultural: the collection and inputting of all the information, particularly relating to the training strand, has required an exercise in trust-building among all the actors, both internal and external.	> Technology: the use of common standards (or mapping tables) in order to qualify information from different sources and effect the necessary matching.

Belgium/ VDAB	Automatic Vacancy Matching	> Matching of vacancies based on 10 criteria	> Job-seekers (general) > Job-seekers over 50 > Employers	> Not directly measured	> First implemented in 2002 > Targeted to a set of regions and younger clients > Due to software problems a switch to new platform (Elise) in 2004 > Follow-up including Jobindicator in 2010	?	?
Bulgaria	Kiosks	> Kiosks were introduced were users can use the online services from a physical location.	> All job seekers.	> No information yet, but the pilot is working well.	> Pilot in two offices now. > Implementation nationwide is foreseen		
Estonia	Automatic vacancy matching	> Structured data is used for matching the job offers with CVs and job wishes. Tool is a part of the self-service portal of the EUIF.	> Job seekers > Employers	> Feedback is positive > More than half of vacancies are matched now	> Fully integrated in business process.	> Structuring data (semantics and classifications)	
	Job search diary	> The tool allows users to report their activities via the self service channels (phone & web)	> Newly registered jobseekers	> No information yet	> Implemented in May 2011 > Fully integrated in business process.	> too early to say.	
Finland	Self-service on www.mol.fi website (portal)	> Helps users define personal goals and options on labour market and education.	> Employees / Jobseekers	?	> Implemented in 1999 and will be improved now	?	?
Germany	Job-Seeking- Online-Process (portal)	> ?	> Jobseekers	> Traffic is being measured > Lower then anticipated.	> Placed in the job board	> increase use > implement new features	> technical changes made
Netherlands	Werkverkenner (vacancy- matching)	> Client-input on region, age and function are matched with job finding data over the last 3 months. It generates advice on chances of job finding and gives alternative options in the search for jobs.	> All clients	> General positive score in "do it yourself" and direct feed back. > No direct relation to placement outcomes	> Via online channel for all clients and PES advisors	> How to match client input and market data to a specific advice in which the client will recognise his/her own position in the labour market.	?

	Persoonsverkenner	> Client input on certain personal aspects proven to be predictions for long term unemployment. The score based on the client input is the basis for the PES advisor to discuss interventions with the client. We aim for automatic advice and interventions in 2014.	> Now targeted in a few pilot offices in combination with online services and e-coaching.	> Project has run for just a short period, until now no data available.	> Pilots	> How to transform a prediction for long-term unemployment specified in personal aspects into concrete interventions that do have a positive impact on the client's personal situation.	?
Slovenia	Ecounselling (portal)	>Help individuals in planning their career paths and searching for jobs.	> Newly registered unemployed	> Annual survey > Increase in usefulness > Satisfaction with content, dissatisfaction with user-friendliness > No measurement of success rate	> Internal promoters and instructors helped disseminate the tool.	> Improving user-friendliness of the tool.	> Counsellors' skills in promoting the tool as well as inclusion of the tool into the counselling process were important success factors.
Sweden	Virtual employment services (under development)	>Combination of tools aimed at service delivery in the virtual space	> New clients	-	-	> Find an attractive approach, to put relevant and interesting information in it, and not to have too many details The solution is to link to further more detailed information.	-
UK	?	?	?	?	?	?	?

¹ Brief description of self-help tool -how does the tool work?

² Has the tool been targeted and/or promoted at particular client groups (based upon research)? Who are the main users?

³ What levels of client satisfaction have been observed in relation to this tool? Have there been any observed changes in relation to different client groups, and if so, what are the possible reasons behind these changes? Is the success rate of such tool measured? If so, what are the results? Is there a qualitative assessment of the tool?

⁴ How was the tool implemented across PES? For example, what information and training was provided, what systems/procedures had to be put in place, were staff re-organised in any way?

4.5 Social media – in the state of infancy, but progressing

Social media, such as Web2.0, developments make use of the Internet as an underlying infrastructure and are a set of media on their own. All social media are characterised by their interactive and networked character. There are differences, however, between the different types of social media.

- Micro-blogging (e.g. Twitter) is a one-to-many push medium with low communication richness but with high speed. Making it highly suitable to send out short messages to a large audience (e.g. payment days of allowances, or the availability of a new service) and for short Q&A on simple matters.
- Social networks, as many-to-many push & pull media, lend themselves to interactive discussions and for presentations, visualisations, instructions, etc. Because of their interactive nature, social media are an interesting addition to the palette of service channels, albeit that virtually no studies exist that provide evidence for the (expected) contribution of social media to client satisfaction as well as organisational efficiency⁸.

In general, the use of social media is still low (see Table 7) Many PES organisations do not use social media, a majority has no strategy (yet) and none systematically evaluate the effectiveness and efficiency of these channels. Although some PES work with targets, they are neither underlined with strategies or concepts, nor measured. This makes it virtually impossible to assess the actual impact of social media within the various PES organisations.

We can cluster the initiatives in **three groups**:

1. **Some experience with social media** [3 PES]

In Belgium/VDAB, Belgium/Le FOREM and the Netherlands PES have some experience with deploying social media and have the most sophisticated strategies.

⁸ The analytical paper will focus on the characteristics of the various service channels and include a detailed section on social media and web2.0

The Netherlands have the most elaborate social media strategy of all participants. They organised the use of social media in 5 different focal points:

1. Customer service via a web care team on LinkedIn, Facebook, Twitter and Hyves. *“We actively use service interventions to support service levels. The team consists of 1 fte (40 hours a week in 4 people shift). We use a specific system to monitor and search blogs, miniblogs, etc. for follow up and interventions. Since the start of the team the measures on sentiments are up.”*
2. Operational service: the Netherlands are piloting the use and efficiency of Twitter, Facebook and LinkedIn to assist with matching processes, the dissemination of event information, etc via local offices.
3. Corporate communication: LinkedIn, Facebook and PES twitter are used to send corporate information on services and events.
4. Internal use of social media via Yammer. Yammer is the Dutch PES' internal social platform to share knowledge and to create discussion groups on various subjects.
5. Individual use of social media by employees: there is an internal code for employees on the use of social media and do surveys on personal behaviour.

2. **Starting to build up** [4 PES].

These are the PES organisations that have implemented one social medium (e.g. Facebook) or are in the process (e.g. piloting) of implementing social media. These are organisations that struggle with the social media strategy and are just gaining experience in doing so. An example is Sweden. Germany has the most ambitious plans in this group, they are working on a strategy (pilot phase) of a combination of social networks, video-platforms and wiki's.

3. **No use of social media** [5 PES].

A larger group of PES does not deploy social media at present

Several challenges are being encountered by the PES and these are similar to the obstacles confronting MCM in general, such as the **organisational change** required. Another challenge mentioned by several organisations relates to **how to attract followers and fans**. Finally, **issues of trust and control** are being mentioned as challenges (e.g. in the Netherlands).

Table 7: Social media

	Type of social media	Targeting and/or promotion	Monitoring and evaluation	Implementation	What have been the challenges for implementation?
Austria	None (SMS Reminders). Use is being considered.	-	-	-	-
Belgium/ Actiris	> Facebook is being considered > Twitter has no priority	> When implemented: all clients.	-	-	-
Belgium/ Le FOREM	> Facebook (since April 2010)	> Young people, jobseekers and companies	> Underway. Qualitative and quantitative assessments will be made > Use grows and users give positive feedback	> Still in process > Needs to be an integrated part of the channel mix.	> Internally, communicating. the need for, that implementation. > Externally, initiating and stimulating interactions on Facebook.
Belgium/ VDAB	> Facebook > Twitter > Videos on YouTube (since 2009)	> There is no specific targeting. The current usage of Facebook breaks down as follows: 57% women, 41% men and 2% unknown. The 25-45 age group constitutes 65% of the usage. No data for Twitter is available.	> Measured in terms of the number of followers or fans, and how many times a link has been viewed. VDAB also monitors what is being said via the social media and on the Internet in general (reputation management) and responds to questions.	> Not integrated in processes, considered additional media.	> Attract followers and fans
Bulgaria	?	?	?	?	?
Estonia	> Facebook > Video (YouTube, Vimeo, Ustream) > blogspot.com	> Mainly younger clients	> User statistics (round 16k-22k visits per month) > Satisfaction not yet measured	> Not integrated in processes, considered additional media.	> Increase awareness in the organisation. > Create interaction between users and staff.
Finland	?	> Young school leavers and jobseekers	?	?	> Participating in Social Media requires a very professional expert team. We need to make a careful assessment in which topics and areas Social Media is an effective and economic tool.

Germany	<ul style="list-style-type: none"> > Several pilots: <ul style="list-style-type: none"> - Pupils and graduates on social networks - 'BERUFE.TV' (video-platform) - 'studienwahl.de' guides through study alternatives - wikis for internal use 	> Pupils, graduates and students	<ul style="list-style-type: none"> > No monitoring yet > User group on social network ranks high 	> A strategy is being created right now.	-
Netherlands	<ul style="list-style-type: none"> > Social networks (Facebook, LinkedIn, Hyves) > Twitter > Yammer 	<p>No specific groups although higher educated and also older unemployed get workshops on how to use social media for profiling and networking and how to make use of communities.</p> <p>The community is tested on higher educated clients.</p>	<ul style="list-style-type: none"> > Less intervention by e-coaches > High client satisfaction > No increase in job-matching 	> "netwerkplein" as a pilot. Use of LinkedIn etc. was just following the spontaneous development of the use.	<ul style="list-style-type: none"> > Creating the proper mix of trust and control. > Dynamic changes and client participation need very short time to market and are essential to create a real and vivid community.
Slovenia	> Under consideration.	-	-	-	-
Sweden	> Facebook (since a few months)	Persons registered at the PES	<ul style="list-style-type: none"> > No data available > Our overall assessment so far is that it contributes to improving our image and that is a rather efficient way of communicating. We are able to answer questions concerning both job-seeking and labour market policies. 	> We are now opening the possibility for the local employment centres to set up local Facebook account. We have elaborated a policy and instructions for use. We have a team at the head office that works with Facebook. Information on possibilities and policy is spread through our intranet.	> To put relevant resources into the project. A qualified teamwork behind the scene is needed in order to deliver relevant and professional answers in the conversations that appear.
UK	<ul style="list-style-type: none"> > Social networks (LinkedIn, Facebook) > Twitter under consideration 	<ul style="list-style-type: none"> > Unemployed > Young people 	?	> The platform requires little management as it is self-managed through members raising questions and issues that are resolved through discussion and suggestions made by other group members, whose backgrounds and expertise include professionals, people in work and graduates.	?

5 IMPLEMENTATION OF MCM: KEY ISSUES AND POTENTIAL OBSTACLES

Based upon the PES contributions a number of key issues can be identified which contribute towards making MCM successful. Below we discuss the most important issues and obstacles and that were mentioned:

- The Digital Divide
- Changes in organisational culture, resources and staff
- Channel Marketing
- The measurement of success

Some other issues that were mentioned are the following:

- IT issues (e.g. linking channels and process [Austria], getting the right infrastructure [Belgium / Actiris], coping with technical demand [Netherlands])
- Security issues (e.g. data protection [Germany])
- Creating user-friendliness [Belgium / Actiris, Estonia]
- Keeping abreast of new developments [Belgium / VDAB, Finland]
- Change working habits of both staff and customers [Finland].

5.1 The Digital Divide has to be addressed

The most important challenge (or pitfall) as mentioned by a majority of PES is formed by the (Digital) Divide issue, the lack of access and skills towards successful use of e-services by clients. Most importantly this concerns the digital divide, but also an educational divide as Bulgaria rightfully argues: *“The main pitfall of the Multi-channelling approach is that certain target groups, mainly with lower educational status and those over a certain age could not benefit from this type of servicing and sufficient human resources should be kept for providing adequate service to these groups.”*

Various countries try to address this issue, by various means:

- Training (e.g. Slovenia), although resource intensive this seems a good strategy to help individual clients.
- Freedom of channel choice as a solution (e.g. Sweden, Belgium/VDAB, Germany, UK). Risk of this strategy is that clients will keep on relying on the traditional channels (out of habit) even in the future.

5.2 MCM has implications for the organisational culture, resources and staff

How the organisation changes very much depends on the current organisational structure, which is hard to assess without additional information. One main issue is the required **change of culture** in the organisation (e.g. Austria, Estonia). The available studies on the subject confirm not only that changing cultures within organisations is an important obstacle towards successful MCM, they also indicate that it is an often neglected issue in the MCM strategies. Indeed, the analysis in the first chapter of this report suggests that very few organisations take into account the required changes in culture (e.g. more customer-oriented, more flexible, more transparent) for MCM practices to be successful

Another key issue are the **implications on resources**, above all **cost-efficiency**. Although one of the main premises of MCM is that it will lower the costs of service-delivery and increase the efficiency of the process, this appears to be a long-term goal, as many PES organisations mention that the implementation of MCM leads to a greater use of resources.

- The Austrian PES suggests that the implementation of new tools is connected to more work.
- Estonia mentions that investments were required, probably leading to an improvement of service quality but not yet to efficiency gains.

To what extent this will indeed be a short term issue, remains a question as valid studies on this area are lacking. The general literature on e-Government suggests that cost savings might be obtained on a service level, but hardly occur on an organisational level⁹. Whether this is valid for PES is an interesting question for future research.

The need to free up resources in general and lower costs, however, is mentioned by various PES organisations. (Finland, the Netherlands). One of the main constraints prohibiting this from happening is the lack of knowledge on client behaviour, and the actual effects of the introduction of new channels and service as well as MCM as a whole. It is particularly difficult to make decisions on resource planning, when there are no objective criteria on which to base these decisions.

Although there is no evidence for a lowering of resources needed, it is apparent that the **distribution of resources shifts**. Sweden has been able to free resources in the electronic processes and allocate more time to those who really need it. It has so far not resulted in less staff resources.

Reduction of staff is by no means a goal for most PES organisations. Impact on staff manifests itself in various ways, most of which have to do with **training/education**. The Finnish experience suggests that the implementation of Multi-channelling needs to be supported by comprehensive staff training with different methods (online self training, motivation, etc.).

⁹ See the analytical paper

When dealing with the impact on staff the following points are crucial (as various PES mention):

- Training of staff in answering more complex/other questions
- Training of staff in new IT tools
- Training of staff in supporting clients in the use of other channels (serving as a help-desk)
- Overcoming resistance to change

5.3 Similar strategies for channel marketing - using all channels

Most PES organisations follow quite similar strategies in promoting the various channels. In most cases the channels themselves are used to promote other channels. For example, the UK PES will use the face-to-face channel to promote digital services: *“We will promote the benefits of digital services internally to our staff and wider departmental colleagues through our communication and learning products. Our staff will be key to the task of supporting, encouraging and explaining to our customers the benefits of a digital and multi-channel approach.”* Belgium/VDAB follows a similar (overall) strategy: *“The various channels are promoted in brochures, online, during fairs, in campaigns and during face-to-face interviews with jobseekers/workers and company visits by account managers and job advisers.”*

Other marketing mechanisms are also mentioned:

- Brochures/Publications (Belgium/Actiris, Belgium/VDAB, Estonia, Slovenia, Sweden)
- Fairs/Events (Belgium/Actiris, Belgium/Le FOREM, Belgium/VDAB, Estonia, Finland, Slovenia)
- Campaigns (Austria, Belgium/Actiris, Belgium/Le FOREM, Belgium/VDAB, Finland, Germany, Slovenia)
- Company visits by consultants and counsellors (Austria, Belgium/Actiris, Belgium/VDAB, Slovenia)
- Visiting schools (Finland)
- Partners (Austria, Belgium/Actiris, UK)

The strategies appear to rely on **communication as the main steering instrument** and seem to focus on certain services, channels or service-delivery as a whole. No single organisation mentions a) the use of other marketing tools (e.g. altering product characteristics or pricing strategies to promote channels and b) the promotion of the use of

certain channels for certain types of services, as would be expected in a supplemental or integrated channel strategy.

However, as Belgium (Le FOREM) puts it is a problem to correlate these types of promotion precisely with the increased use of the channels, which we see nonetheless” (Belgium/Le FOREM), a problem also mentioned by Finland and Slovenia. Although it is indeed difficult to assess the effectiveness of channel marketing, research shows that, in carefully controlled settings, the effects can be measured.

5.4 Measuring success - more comprehensive approaches will be needed in the future

Experience shows that using only the standard indicators yields too little information to adjust the channel strategy, for example the knowledge that the number of users of a certain service does not increase does not tell you what causes it and how this (potential) problem needs to be solved.

As the PES contributions show **an overarching and complete research/analysis strategy** to measure the progress and realisation of the MCM strategy is still a **challenge for the future**.

Despite the lack of a comprehensive evaluation approach, **most PES undertake efforts of performance measurements**. Most organisations use fairly standard indicators regarding the use of channels and services, e.g. the volume of contacts per channel. Some PES (e.g. Austria) include data on the types of users in order to monitor channel and service usage per user segment. The number of indicators does vary; Sweden only reports the volume of users in the channels and Bulgaria monitors the number of published vacancies and as well as the number of jobseekers who have registered their profile on the EA’s website. In contrast, Belgium/Actiris produces a great number of statistics via its data warehouse.

Some PES describe interesting approaches in individual areas. For example the Netherlands Slovenia and UK serve as an example in extending current measurement practices. Moreover, a number of PES organisations (Austria, Netherlands, Slovenia and the UK) report the use of additional studies to acquire more in depth insights (e.g. surveys and interviews).

The UK serves as a good example of a PES that has an extensive measurement framework: *“A simple, single measure has been introduced as a progress guide. It aims to show staff/customer telephony hours decreasing compared to digital contacts increasing. Further information at a more detailed project level will be available as each individual project goes live. These are in addition to our agreed Departmental Performance framework. Also, quantitative and qualitative research has been undertaken on the current practice, future likelihood and willingness of users engaging via digital channels.”*

6. CONCLUSIONS

The comparison between the different PES organisations yields valuable insights regarding the possibilities, challenges and aims of integrated MCM. It shows some remarkable similarities with respect to the overall perceived advantages/aims of MCM (customer satisfaction and cost-efficiency) but also reveals dissimilarities in terms of the strategies followed. The following conclusions can be formulated:

- The overall mission is generally phrased as improving service-delivery, while reducing the costs. However, no single organisation reports true gains in efficiency and lower costs so far.
- The strategies followed vary widely and up to now no organisation follows a truly integrated strategy. Most keep the channels open parallel to each other, while (softly) steering clients to a preferred (online) channel. This most likely benefits customer satisfaction, but hampers cost-efficiency. The second most popular strategy is one whereby specific services are offered via specific channels. While this has the potential to be more efficient, it raises concerns regarding access and the digital divide.
- Social media offer promising approaches for the future. Whilst social-media are interesting, no organisation reports gains and real benefits (e.g. in a decrease in the use of the other channels). Furthermore, a more general question is whether social-media are merely a hype or here to stay.
- Self-help tools are relevant and here to stay. Various PES report encouraging results and in line with eCommerce applications (e.g. e-Banking) it is likely that customers will be eager (in the future) to use these tools. The tools from Austria and Belgium/VDAB are especially noteworthy. These examples also show that these tools are most likely to succeed when they are part of the integrated Multi-channel strategy. This implies that a) the same back-office is used, b) support for the tools is well organised in the other channels, c) channel marketing focuses on these tools, in conjunction with the other channels and d) are embedded in the existing organisational structure whereby it is especially important that they are positioned as complements (and not substitutes) to the other channels.

The following key recommendations can be formulated:

1. It seems wise to keep the mission coherent, attainable within a limited time-frame and measurable. Many PES organisations use ambiguous or contradictory language in their mission, formulate no concrete steps and milestones and do not evaluate the progress. An MCM mission needs to be S.M.A.R.T.-ly translated in the strategy.
2. Successful approaches align the strategy to the mission/goals (in conjunction with the above). For example, keeping all channels open with freedom of choice for clients will very likely not lead to cost-savings.

3. The success of MCM depends largely on the involvement of customers. While customer-orientation and customer satisfaction are often mentioned, only few PES organisations really involve their customers. This needs to be done through qualitative research in the design phase and quantitative and qualitative research to evaluate the implementation. Ideally, the PES organisations start benchmarking to measure their own progress as well as to make comparisons with other PES organisations.
4. Include soft factors in the Multi-channel strategy plan (e.g. cultural change, education strategies, communication plans, organisational change). Whilst factors such as resistance to change and cultural problems very often hamper MCM implementation, just few organisations include such factors in their mission and the derived strategy. A wide scope in stead of a narrow scope -merely focussing on introducing new, or optimising channels- is therefore advised.
5. Measurement and evaluation are crucial for success. Although most organisations collect basic statistics (e.g. number of visits per channel), only few collect the more advanced data that are required to evaluate MCM progress and make informed decisions. Ideally objective (hard) data with much detail (e.g. the number and success-rates of services used per segment, per channel and per time-unit) are combined with subjective (soft) data (e.g. customer satisfaction and more importantly, customer needs).
6. Self-help tools can help in increasing effectiveness and efficiency. As the internet-population grows more mature and gets experienced with using eCommerce applications, self-help tools are a promising direction to lower the burden on the existing channels. Do bear in mind that this requires a repositioning of the existing channels (shift from service-channel to support channel). Direct input into the PES data-base (e.g. employers automatically submitting vacancies) is another efficient way to streamline processes.
7. Channel marketing strategies aid in implementing integrated MCM.. While most PES organisations promote the use of the online channel, this often is not enough to persuade users to use the desired channel. A combination of 'soft' measures (varying service levels per channel, education) and 'hard' measures (e.g. pricing strategies or enforcement (compulsion)) is more effective and has surprisingly little impact on customer satisfaction.
8. Staff training facilitates the transition. As the analysis shows, staff training is an important issue and it consists of various types of training. No organisation reports the inclusion of all types of staff training, yet all types of training do seem to play an important role. Focus thereby on; a) answering more complex/other questions, b) new IT tools, c) the use of other channels (serving as a help-desk) and d) overcoming resistance to change.