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PRACTITIONER'S TOOLKIT

TO ASSIST PES WITH THE DEVELOPMENT OF CUSTOMER SATISFACTION MEASUREMENT SYSTEMS

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Introduction

What is the purpose of the toolkit?

This toolkit is intended to **assist PES in designing and implementing their approach to measuring customer satisfaction.** It provides concrete guidance and tools for PES to either develop customer satisfaction measurement (CSM) systems from scratch, or to review and refine existing systems, while taking into account wider organisational and contextual factors.

The toolkit helps PES to answer the following key questions:

- What are the steps in planning, designing and implementing CSM?
- What are the most effective ways of measuring customer satisfaction?
- How can the results from CSM be used to improve PES service delivery?

Why have a toolkit on customer satisfaction measurement?

It can be a real challenge for PES to achieve sustainable employment and employability, while at the same time improving service delivery with finite resources. An important way of addressing this challenge is understanding the importance of measuring customer satisfaction, so that **CSM results can help to continuously improve PES services** – particularly in terms of ensuring that these services are more closely linked to customer needs.

There are a number of other advantages to measuring customer satisfaction in PES:

- thanks to regular feedback provided by customers, the efficiency of PES services can be increased, as more and better results can be achieved with less resources and the need for re-working can be reduced;
- the availability and appropriate use of CSM results can fulfil the need for PES transparency and public accountability towards citizens and therefore foster wider societal and political requirements or commitments;
- CSM data enables PES to meet their legal requirements, as set out in the 2014 Decision on enhanced cooperation between Public Employment Services, which established the European Network of PES. **The customer satisfaction of jobseekers and employers are two of the benchmarking indicators that all EU PES are required to report on** to the PES Network.

Who is the toolkit aimed at?

The toolkit is aimed at all PES practitioners who are involved in designing, setting up and running CSM systems, as well as those who use the results for the ongoing development and reform of PES service delivery.

How is the toolkit structured and how do I navigate around the information?

The toolkit is organised around **three main steps,** based on a cycle of continuous improvement:

1. **Planning and designing** – providing practical advice on the development of new or existing customer measurement approaches;
2. **Implementation** – providing practical advice on CSM implementation issues, regarding data gathering and analysis, and the reporting of results;
3. **Monitoring and evaluation** – reviewing the whole process and using customer satisfaction results in service improvement, both at operational and strategic levels.

Each step contains a range of practical information tips around what to think about and which actions to take in any CSM approach. This includes 'practical tips', tools and templates, PES examples and signposts to further information.

The toolkit is developed for people in a variety of PES roles. You can navigate around the information in various ways depending on your role.

Are you a practitioner charged with designing, developing and implementing CSM systems?

If Yes, reading the full toolkit, as well as the annexes is highly recommended.

Are you a senior PES manager?

If Yes, you should ideally review Section 1.1 on assessing the need and capacity for CSM in your PES, especially with regard to specifying your target groups (1.1.1 and 1.2.1), setting standards (1.1.3) and assessing your internal capacity for CSM (1.1.3). In Step 2 on implementation, consider Section 2.2 on the reporting and dissemination of CSM results. Step 3 focuses on monitoring, in which the sections on staff engagement (3.2.1), linking CSM and performance management (3.2.2), and the strategic use of CSM (3.2.3) are the most relevant.

Are you an operational delivery manager?

If Yes, you can familiarise yourself with the Step 1 Section on defining target groups and deciding what to measure (1.1.1 and 1.2.1). Section 2.2 on reporting and disseminating CSM results will be of a key area of interest for you. In addition, Section 3.2, which contains core material on using CSM data to achieve service improvements and aligning it with your performance improvement responsibilities, is also highly relevant for you.

Are you a policymaker in PES and/or a government ministry?

If Yes, you should consider Section 1.1 on the need for CSM, in particular Section on understanding customer needs (1.1.2) and defining standards (1.1.3). In addition, you will want to consider how the choice of target groups align with the PES and overall labour market strategy (1.2.1); as well as on reporting and disseminating results (2.2.2); and using CSM to develop a strategy (3.2.3).

Are you a performance manager?

If Yes, you should consider the implications of choosing target groups for CSM (Section 1.1.1) and of setting standards (1.1.3). In addition, the section on data collection (2.1) and reporting and disseminating results (2.2) raise key alignment issues; and Step 3 as a whole covers performance improvement issues of key interest (especially in 3.2.2).

Step 1. Planning and designing the Customer Satisfaction Measurement System

KEY HIGHLIGHTS

In this step, you will learn:

- how to assess your CSM needs and define key target groups for your PES;
- how to assess the capacity of your PES to design and implement an effective CSM system; and
- how to choose the best methodology (in terms of subjects of measurement, frequency, sample size and structure, delivery channels, etc.) in reference to the two assessments above.

KEY MESSAGES

- Consult policy and operational stakeholders before deciding which customer groups will be covered by CSM and check alignment with key strategies and the EU benchmarking requirements.
- Set customer service standards that draw on robust evidence of customer needs. Choose questions and scoring scales of lasting usefulness – changes questions from year to year undermine the value of CSM.

1.1 Assessing the need and capacity for CSM in your PES

1.1.1 Choosing your target customer groups to measure satisfaction

It is vital to be clear about who your customers are and how you define the term 'customer' in your PES. It will underpin decisions around the standards and targets you may wish to set and the measurement approach you use.

You will need to decide on the following two questions:

1. Which target groups are you going to measure satisfaction for; and
2. How you are going to specifically define that group?

For every PES, **the main two customer groups to measure satisfaction for are jobseekers and employers.** A PES that has less experience measuring employer satisfaction may wish to start with setting up a system to measure overall jobseeker satisfaction since this group will almost certainly be larger and the one for which service improvements can be more readily identified. The PES can then integrate employer satisfaction into its overall approach to CSM as soon as possible afterwards. The approach set out in this toolkit covers the tools to measure both jobseeker and employer satisfaction. Therefore, a first step in the approach is to **decide whether measurement of both target groups will be done in conjunction or rather one shortly after the other.**

Careful definition of customer groups is the second important step. Most PES that measure customer satisfaction **disaggregate jobseekers into sub-groups**. Defining the sub-groups could include measuring satisfaction by age, gender, educational level, health/disability, years of employment or duration of unemployment (more detail is provided in Section 1.2.1 on defining your customer groups to decide which specific sub-groups to cover). Most PES have a strategy or mission statement that can be used to come up with appropriate definitions. The final decision in defining customer groups (and data on their satisfaction) is an important one for a PES: good practice entails ensuring that senior managers are involved in making those decisions.

After defining your target groups, you will set the operational and strategic targets of customer sat-

Meeting the EU requirements for CSM: what does good practice look like?

The benchmarking indicators for all EU PES define some key target groups who should be prioritised when making decisions on CSM. As a minimum, PES need to cover jobseekers and employers. Going beyond that, they can also include the unemployed across all age groups, and vulnerable groups (such as the long-term unemployed or socially excluded who register with the PES after having been previously inactive).

isfaction. Your first step of this process is to **consider the strategic position of the PES as a whole.** In this context, setting a strategic customer satisfaction target will usually apply at the level of public and political accountability. Depending on your own PES, that may apply at the national, regional and/or local level and may influence which stakeholders you should consult with.

In a second step, the customer groups you have defined data collection for in the section above will offer a shortlist of possible **strategic customer satisfaction targets.** Usually this will involve asking the relevant customers a direct question about their level of satisfaction with the PES service provided. You will need to consider questions of cost and capability (see Section 1.1.4 below for more detail). It is also worth applying a 'reasonability test' to any target you select. This means that you have ensured that a published target could be understood and endorsed by a reasonably informed citizen without detailed explanation.

In a third step, **consider the number of strategic targets** you wish to set. At the level of public accountability, it is often simpler and more appropriate to offer one or perhaps two targets: for the customer satisfaction of jobseekers and separately for that of employers. You should also consider the 'fit' of the proposed target(s) with other PES targets and work with performance management colleagues to ensure they comprise a coherent package of success measures.[1]

In a fourth and final step, **consider the operational targets for the PES.** These usually form a suite of lower or more detailed targets. In addition, they form the tools to hold regional and/or local managers to account and should generally be designed so that they can support improvements in local processes or staff capability in response to performance data.

1 This point is relevant to the Practitioner's Toolkit on PES performance management.

There are two broad approaches possible in addressing this: the first is **to design and set practical management targets**, often around process or local organisation on measures, such as queuing time for appointments or phone calls. These indirect measures can be assumed to measure raised or lowered satisfaction levels. This can be a less costly approach if the relevant data is already available through management information systems.

An alternative approach is **to apply the same satisfaction measure and approach at national and sub-national levels**. This can be more expensive, since bigger local samples are required, but has the advantage of transparency and clarity in comparing organisational units in different locations, improving performance and reducing variation. The disadvantage of direct satisfaction measures can be that they rarely give clear guidance on what to address to achieve higher satisfaction levels.

An interesting **example of integrating CSM as a key performance management indicator** is provided by the French PES. This practice aims to integrate CSM within the result-based management at all levels of French PES, contributing to measuring the services' efficiency within the framework of the Strategic Roadmap and tripartite agreement between the PES, Ministry of Labour, Employment, Vocational Training and Social Dialogue and national social partners.

1.1.2 Understanding customers' expectations and needs and using this information to improve the service offer

Customer satisfaction data whether drawn from surveys, more qualitative focus groups, analysis of complaints or other reported assessments of operational staff, can provide **invaluable insights into your customers' expectations and needs in regard to PES services**. It is important to have this in mind when designing the structure and questions in your survey so that your results begin to develop a time series of data[2] on which you can act.

Your aim should be to track and record the data so that it can be used at a number of levels within the PES, and to do so against at least some of, and ideally all of, the **five key dimensions of service**[3] for which to measure satisfaction, which are covered in more detail in Section 1.2.2 below. That means it should be possible to use your data operationally at local or regional level to identify service challenges that local delivery managers can address. The need to do this is often exposed by notable variations in performance. A common example might be a location where CSM scores were low on accessibility or speed of service in comparison with other locations in the same region/municipality. That might point to the need for targeted action to review and improve local appointment systems or signage.

Local action to improve should be a standard practice in response to each wave of CSM results as they are communicated within the PES. It is often useful to invite operational managers to compare results in nearby or comparable locations to reinforce benchmarking within the PES.

At a national level policymakers and top managers can use emerging data in a range of different ways in parallel with the actions on day-to-day service delivery improvement described above. **CSM data at national level can support:**

- **comparisons of efficiency and effectiveness** between service delivery channels and as such form an invaluable element in strategic decisions about the business balance between face-to-face, telephone and digital channels of delivery;
- **high-level performance reviews of the PES as a whole** as part of a balanced scorecard of achievements;
- **identification of structural service gaps** that need to be filled by changes in national policy; and
- **evaluation and assessment of customer reaction** to significant changes in high-level policy such as the increases in the intensity of active labour market policy or the labour market consequences of new social protection measures.

2 Gathering comparable data over time will allow you to build a data set that gives the possibility of observing trends over time.

3 The five key dimensions are: timeliness, accessibility, respectful treatment, reliability of information provided and expectations being met.

PRACTICAL TIPS

Practical tips on defining the objectives of CSM

There are **two high-level risks to be aware of and to guard against**. The first is that **CSM is seen as a secondary or lower level task for the PES** and less important internally and externally, even to be set aside in difficult times. The second, by contrast, is that **raising customer satisfaction becomes an overriding goal** more important than the core PES tasks of finding jobs for unemployed people and filling job vacancies.

1.1.3 Considering wider standards and broader requirements to be met by CSM

The keynotes to successful and sustained CSM implementation are **coherence and alignment**. Your CSM proposition should be aligned with the mission, objectives, and performance measurement approach of your PES. In a nutshell, it should reinforce what you are trying to achieve and it should be coherent with your high-level policy goals – especially those of moving towards a more active labour market PES model.

The PES CSM system and associated service standards should draw widely on examples from PES practices, including those set out in this Toolkit by appreciating what can be achieved with limited resources and developing an evidence base of how good customer service can support and drive better PES performance overall.

This should be informed by **specific success criteria** that ideally include:

- a clear alignment between the PES mission, its priorities and its targets;
- a rounded portfolio of targets for performance outcomes and service levels that support and reinforce each other; and
- a package of customer satisfaction measures that builds a time series of data that drives both policy and delivery practice across PES.

All of these criteria should be clearly communicated within the PES and to its key partners, especially at Ministerial level.

Table 1 Costs and benefits of customer satisfaction measurement in PES

COSTS	BENEFITS
▸ The one-off project costs of system design and implementation. ▸ Maintenance and development costs of the system over time. ▸ Any additional costs of procurement and contract management if the work is outsourced. ▸ Management costs in responding to results and data as disseminated, and in upskilling.	▸ Immediate increased focus on PES customer needs. ▸ Improved service drives efficiency gains and increased job placement outcomes. ▸ Data helps delivery managers identify and tackle performance variation. ▸ Design of new services and programmes is improved.

1.1.4 Assessing PES capacity for internal design and implementation of CSM

A crucial step when developing your CSM system is **to assess to what extent the tasks can be undertaken in-house or are better outsourced**. More specifically, you will need to consider:

- the technical resources and skills available within your PES on survey design and maintenance;
- whether these resources are sustainable and available for long-term CSM tasks such as change and redesign of surveys as policies and priorities develop;
- whether your PES systematically collects the email addresses and phone numbers of unemployed people in order to be able to conduct electronic surveys or telephone interviews;
- the extent to which your PES has the capacity to analyse surveys and other CSM data and present these in a way which is accessible and meaningful to managers, policymakers, and key external parties with an interest in results such as, for example, your Ministry;
- the skills available within your PES to understand and deploy CSM data in decision making; and
- the communication options needed within the PES to communicate your plans and goals for improving customer service to your front-line staff.

Assessing the internal capacity of your PES will help define the boundary between what you can do in-house without risk, and what you might consider for outsourcing.

Alongside the issues listed above, **in areas where you judge that outsourcing should be considered, you should**:

- review and take account of any wider policy on outsourcing your PES is expected to take into account;
- research the marketplace to establish the existence of likely bidders of sufficient quality; and
- establish that your PES has, or has to gain access to, the skills in commissioning, procuring and managing outsourced work of this kind.

It is important as part of your CSM implementation plan **to look at the impact of your proposals on the PES as a whole**. You will have seen in the sections above that – if the project is to be carried out effectively – there will be significant changes and/or new tasks for senior managers, national policymakers, technical experts (whether in-house or outsourced), operational mangers at every level and frontline staff.

Your implementation plan will need to take these impacts into account and establish who is responsible for managing them. It is likely, for example, that PES staff trainers would have a significant role in implementation.

You are now ready to start working on the action plan. Feel free to use the template in Annex 1.

1.2 Choosing the methodology and aligning with set objectives

1.2.1 Specifying target groups of CSM

As described in Section 1.1.1 above, the two major customer groups for which satisfaction is measured in PES are jobseekers and employers. These two groups represent the 'customers' as understood in PES delivery models in the majority of EU PES.

Jobseekers as 'customers' constitute the main group of PES service users, and as such the measurement of their satisfaction is vital for the quality assurance of these services. Most commonly, jobseekers are targeted for CSM at the point of registration with the PES. Some PES define this differently, as individual customers at the point of registration form a heterogeneous group consisting of: unemployed (who sometimes have other legal statuses, such as jobseekers), unemployed benefits recipients, benefits claimants (including those disallowed benefits), apprentices, customers of career information services, etc. It is therefore vital **to decide which type of customer within the jobseekers' group will be covered by CSM.** Note that jobseekers may need to be defined in a number of different ways, for example by the services they receive as categorised above; by inherent personal characteristics such as age, gender or ethnicity; or by contextual characteristics such as homelessness, recently redundant, etc.

In relation to jobseekers you have to remember that the right balance in the assessment of customer satisfaction for this target group needs to be retained: this group of customers often needs to be incentivised to take required actions and sometimes needs to be sanctioned. This might in turn affect the perception of services received and the overall level of satisfaction.

Employers as 'customers' are a slightly different group of PES service users. They can be recipients of direct (or indirect) support from PES, for example, using PES matching services. Such active service users usually become customers (and are included in CSM) at the point of notification of vacancies to PES or when taking on candidates from the PES.

You can consider employers as targets for CSM even when they are non-users of services. These might be employers who, for some reason, decide not to use the PES services or those who do not meet the formal/legal criteria for service users (e.g. do not notify vacancies), but for example, use service-specific information by browsing PES job portals, notice boards, etc. In both cases, **it is important to understand why they do not use the services or do not cooperate with the PES** and what could be done to better match their expectations. Notifying vacancies by employers is key to increasing PES capacity to deliver effective support to other service recipients (jobseekers, apprentices, etc.). Therefore, some countries (UK[4], Denmark) are already performing surveys among this target group.

1.2.2 Deciding what to measure

Every service organisation, including public services, should aim at having generally satisfied customers. In order to achieve this aim, it is important to measure general levels of satisfaction for each customer group, as defined above.

In the context of benchlearning[5], all PES are expected to report against **a number of quantitative indicators for CSM** covering:

- For jobseekers: overall satisfaction; satisfaction with the quality of online services; satisfaction with the quality of the placement/counselling services.
- For employers: overall satisfaction; satisfaction with the quality of candidates sent to prospective employers for a job interview; satisfaction with the quality of online services; satisfaction with the availability and helpfulness of PES staff.

However, measurement of the **overall satisfaction with the service by itself is often perceived as an insufficient measure of customer satisfaction**, especially when the measurement is done with a view to introducing changes and improvements to the service on the basis of the survey

4 As the UK national employer survey is based on a random sample, employers that do not use DWP services, as well as those that do, are included. For example, a few survey questions ask if they have made contact or obtained info from DWP about a range of issues; they then have the option of responding that they have not had contact with DWP in the last 12 months.

5 See more explanation on the concept of 'benchlearning' in Article 2 of the legal Decision No 573/2014/EU of the European Parliament and of the Council of 15 May 2014 on enhanced cooperation between Public Employment Services (PES).

findings**.** More specifically, results on this indicator do not provide information on the areas needing further improvement and/or on currently well-performing areas. In order for PES to be able to make necessary changes to improve service delivery based on customer satisfaction outcomes, measurement should, as a minimum, focus on the following **five key dimensions: timeliness, accessibility, respectful treatment, reliability of information provided and expectations being met.**

Overall satisfaction – refers to the overall perception of customers on the quality and adequacy of the service provided, without a division of service processes into specific components. As such it is focused on measuring general impressions by asking questions like:

- Overall how satisfied were you with the service received?
- Would you recommend the service to others?
- Did you experience any difficulties using the service?

In addition to the measurement of overall satisfaction, there are the five key dimensions defined as follows:

Timeliness – refers to the timely delivery of PES services as perceived by the customer. A failure to adhere to agreed timescales might significantly hamper the perceived overall satisfaction with the services received. Questions referring to timeliness might include the following:

- Were services provided within agreed timescales?
- How fast was the response time to your questions/queries? How long were you kept waiting (queuing time)?
- In cases of failure to deliver the services on time, were remedy efforts made quickly?

Accessibility – refers to the extent to which the customer perceives the service as being easily accessible and available in places and through his/her preferred channels. It might refer to the ease of contact with the organisation or a specific person within the organisation as well as ease of access to a facility or location of service provision. Questions referring to accessibility might include the following:

- How easy was it to find contact details (telephone number, email address, dedicated website, etc.) for services/contact people in the service?
- How understandable were instructions/answers provided by staff?
- How understandable were the design and layout of forms/information provided through different channels (e.g. website, leaflets, etc.)?
- How accessible were the services in terms of access to public service areas (e.g. for disabled), hours of business for personal contact, telephone information services, opening hours, etc.?

Respectful treatment – refers to customers' perception of being treated respectfully in relation to general politeness and courtesy of PES staff, as well as perception of consideration for the customers' feelings. It might also refer to the right treatment of people with complex problems, respecting differences and diversity and awareness of non-discrimination policies. Questions referring to respectful treatment might include the following:

- Were you treated with respect and understanding?
- Was the staff helpful during the contact with services (help received in filling out forms, conversations, drafting of individual action plans, etc.)?
- Was the manner in which staff provided information/explained the issues supportive and positive (right attitude of staff)?
- Was the privacy of information retained? Did staff adhere to confidentiality principles?

Reliability of information provided – refers to the customers' perception of the provision of specific information, tailored to the needs of the individual and which allows for the proper and full use of services provided. Reliability might refer, for example, to information on the procedures of service provision and existing rules, or the information provided during the service process, e.g. on employment opportunities, ALMPs[6], labour market situation, etc. Questions referring to reliability of information provided might include the following:

- Were you informed about your rights and obligations?
- Were you satisfied with the quality of advice/guidance/information received?
- Were you provided with up-to-date information on employers' demands? Available jobs? Places of apprenticeships/traineeships?

6 Active Labour Market Policies.

- Was the language used in (written and spoken) communication understandable? Was the staff able to translate complex information into understandable communication?

Expectations being met – refers to the customers' perception of to what extent their expectations were met by the services provided. This is the most subjective area of satisfaction measurement as it refers to customers' preconceptions of the services, which might not be in line with the service offer. Questions referring to expectations being met might include the following:

- Did you clearly understand what you can expect from the PES services?
- Did you understand what you need to do on your side to fulfil the service contract?
- Did staff show you patience and appreciation of your individual needs and situation?
- Were your personal characteristics and individual expectations considered?
- Did you receive a comprehensive service (was your problem solved)?
- Were the services provided better than expected (worse than expected; the same as expected)?

Some PES define the customer satisfaction dimensions differently to better reflect their specific service models. For example, the UK PES developed a customer service metric based on their customer charter which measures satisfaction across the following five areas: ease of access, getting it right, keeping you informed, right treatment and overall satisfaction.

PRACTICAL TIPS

Choosing measurement frequency

Too much measurement can limit PES' capacity to react: some PES reduce the frequency of their measurement from quarterly to twice a year with practically no impact on the quality of results. Balanced frequency also allows for change to take effect and be observed more accurately between two measurement points.

'Too often' or 'not often enough' depends on what is being measured and the demographics of the target groups. No matter what frequency of measurement you choose it is advisable that you measure customer satisfaction on regular basis.

In choosing measurement frequency you have to be clear about what your questionnaire/survey refers to: is it a given product or service or generally the last contact with the PES? You have also to be specific in terms of the timeframe you are analysing (e.g. contact/service provision within last three months).

1.2.3 Choosing the measurement frequency

Currently PES in Europe differ significantly in regard to the **frequency of measuring customer satisfaction**. There are various options to choose from: surveys can be undertaken: annually, bi-annually, quarterly, monthly, after each contact, as well as ad hoc (as needs arise) or there can be some special edition surveys. In Annex 2 (Table 3) you will find the overview of the options for CSM frequency.

You can choose from the **different points of measuring:**

- Some PES choose to measure after any contact with the customer, but measurement can also be done after a service delivery is provided.
- The point of measuring might be set for a certain time after the service is provided (e.g. three months after registration in the case of Sweden).
- You can monitor customer satisfaction on a monthly basis through post-service customer insight surveys in order to identify and possibly remove ineffective services (like in Finland).
- You can also choose to measure on an ad hoc basis (in addition to regular measurements rather than replacing these) in case of specific objectives, programmes or thematic analyses responding to current requests.

The point of measurement is often irrespective of the service channel (face-to-face, online, telephone). You can also choose to perform measurement at different frequencies depending on the target/customer group. For example in the UK, the jobseekers' survey is performed on a quarterly basis, while the employers' survey is done annually. Further information on the **UK's PES approach to measurement** can be found in here.

In summary, measure according to the rate of change: once or twice a year should be sufficient on 'generic satisfaction' questions (how well are we doing at...? does our overall service meet your needs...?) but questions about processes and detailed service can deliver useful information on trends if asked more often – say quarterly. Examples of this might include, when you last phoned us was the call answered swiftly? Or when you last saw an adviser/counsellor did they submit you to a job?

1.2.4 Setting channels for CSM

There are **different channels to access customers to measure their satisfaction**. You can use:

- telephone;
- email;
- text messages (sms);
- face-to-face feedback (either in a PES office or outside).

The **pros and cons and pre-conditions of each approach** are presented in Annex 2 (Table 4).

Customer survey inputs and results can be an effective way to support the delivery of PES channel management strategy. These findings might be used to assess what could encourage customers to use the desired support/service access channels. For example, if the PES strategy aims at the increased use of the digital service delivery, customer satisfaction surveys might provide insight into which incentives might encourage those clients who can use self-services to use online tools.

1.2.5 Defining the sample size and structure

Defining the sample size and structure is an important step towards reliable and informative CSM. Although different approaches are possible, a minimum of four steps should be performed:

1 Determine your study population

The sample size and structure should be aligned with the population of concern. In terms of CSM in PES, the population will be all people regarded as customers who used the services[7] in a given time frame. For some surveys, there might be some sub-populations – subsets of population sharing some characteristics e.g. based on specific PES services they used.

7 As described earlier, some PES also perform CSM of non-users of services. In this case the population will be differently defined.

EXAMPLE

Varied access channels for CSM in the German PES

An interesting example is provided by the **German PES**, in which four separate methods for gauging customer satisfaction are employed.

For the last 20 years, the PES has conducted surveys for market and opinion-research purposes. The range of surveys includes measuring the satisfaction of external and internal customers, service satisfaction, and the functionality and use of the IT-systems; assessing the quality of products, programmes and processes; and measuring employee satisfaction (management feedback, Engagement-Index, Health-Surveys and risk analysis, etc.). For these surveys, the PES uses different instruments (paper, internet, telephone) in different ways (random samples and complete surveys).

The survey method has been designed and implemented by the Centre for Customer and Employee Surveys (*ZKM – Zentrum für Kunden- und Mitarbeiterbefragung*). Every year, ZKM implements up to 70 surveys involving more than one million potential customers and employees; 300 000 of these individuals use CATI-interviews (for a link to the surveys in German, please click here).

The different methods used to measure customer satisfaction specifically include (European Commission, 2014a):

- regular telephone surveys, conducted by the Centre for Customer and Staff surveys;
- special customer surveys for the acceptance and optimisation of the IT Platform;
- case-related complaints or positive appraisals, which are periodically evaluated;
- feedback regarding the online channels, obtained from face-to-face contact.

Furthermore, the German PES undertakes an annual online customer satisfaction survey with employers. In this survey employers are asked to provide a rating between one and six (one being the highest, six being the lowest) in five areas: overall satisfaction; placement and counselling services; information and self-help services; consultant; and setting/conditions (European Commission, 2013a). In 2013, approximately 80 surveys with over 1 million customers were conducted.

There are a number of examples from PES on the issue of choosing the right access channels for the CSM and different arguments behind it, for example:

- in Austria, the PES decided to stop using online channels for feedback on the grounds of methodological concerns; and
- in the UK, customer service and satisfaction measures expanded in scope and content to respond to growth in customer use of digital channels.

2 Determine the type of sample

Samples can be generally divided into two types: **probability samples**[8] **and non-probability samples**[9]. In some cases, the use of non-probability sampling (also called non-random sampling), methods like purposeful purposive sampling[10] or quota sampling might be justified. For example, snowball sampling, where recruited respondents indicate further study subjects might be useful in relation to non-users of the PES services (as this technique is often used for the 'hidden' populations).

However, in the majority of cases, probability samples are used to assess the opinions of customers on the services provided. A review of diverse probability samples is provided in Annex 2 (Table 5).

8 Probability sampling is a group of sampling techniques aimed at defining the sample in which every element (out of the broader population) has the chance of being selected.

9 Non-probability sampling is a group of sampling techniques aimed at defining the sample in which some elements (of the population) have no chance of being selected.

10 Purposeful sampling is when the researcher chooses the specific cases to study 'on purpose', not randomly.

PRACTICAL TIPS

Aligning access channels and questionnaires

Where you can, try to use the same questions, scales and measures across all or several channels. This will help you compare service levels and achievements across the whole PES delivery model. For example, speed of response to a request for information or advice (or 'queuing') can be measured for telephone, email and face to face channels. This will assist you in deciding which channels of delivery are preferred by which category of customer, and can provide useful data in deciding how to allocate staffing and other resource within your PES.

Some measurement methods (like short feedback acquired through a text or the telephone) require shorter, simplified questionnaires, so that the respondent is able to follow (and memorise!) the questions being asked by the survey, or to be more eager to respond to them.

3 Determine the sample size

In this step, you calculate the sample size. Sample size is dependent on the population structure and research method employed, and as such, must be calculated individually at the service/survey level. In determining the sample size, remember to:

- consider the margin of error and required result accuracy;
- determine the confidence level; and
- consider sampling error and biases.

It is always desirable to aim at representative samples, as it allows for the proper identification of service quality issues and corrective actions.

4 Perform the sampling

Once you have determined the sampling procedure and described it in the internal documents (e.g. for future references; internal audit control; reporting, etc.), you must decide on whether to perform the sampling internally or externally. As the majority of PES have full access to customer data (including data on service process [in all cases], and administrative data on social security, work history, etc. [in some cases]), it is reasonable to perform the process internally. In case of inadequate internal resources and PES capacity to perform this process internally, it might be outsourced to an external provider. However, it is advisable to retain the control of the sampling process in this case.

The sampling process and use of statistical models for CSM (as for other questionnaire-based research) **is dependent on a number of factors**. Therefore you are encouraged to look for more information on these issues at the references provided in the 'Further information and resources' at the end of the Toolkit.

EXAMPLE

Sampling processes in the French and UK PES

In **France**, the annual jobseeker survey (licensed by the French PES and carried out by IPSOS*) has the following methodological parameters:

- **Target:** Jobseekers registered with the French PES.
- **Data collection mode:** 19-minute questionnaire-based telephone interviews.
- **Scope:** 4 000 interviews, with a minimum of 75 interviews per region.
- Questionnaire only focuses on general services provided at the national level, without going into detail about services provided at the regional or local level.
- Questionnaire includes either closed or multiple choice questions.
- Representative sample based on the following criteria: region population size, length of time as jobseeker, and whether the jobseeker receives unemployment benefits or not.

* IPSOS is a research market company.

In the **UK**, the PES customer satisfaction survey employed has the following methodological parameters:

- **Sample size:** Approximately 16 000 customers interviewed annually (4 000 each quarter).
- **Rating scale used for all questions:** Very Satisfied; Fairly Satisfied; Fairly Dissatisfied; Very Dissatisfied (used by the Department of Work and Pensions to report satisfaction levels across its main customer facing businesses).
- **Data collection method:** survey primarily conducted over the telephone (CATI); Option to provide postal questionnaires in certain cases (e.g. deaf/hard of hearing people).
- Representativeness of sample with inclusion of certain subgroups (e.g. BME, young people aged 18-24, new customers, carers).
- Inclusion of 'guest' modules on specific themes of interest; occasional addition of a module of questions addressed only to a subset of respondents to measure the impact of particular initiatives.

Designing and developing a customer satisfaction system: what does good practice look like?
Measure customer satisfaction for two key target groups: jobseekers and employers
Keep data collection consistent over time i.e. avoid changing questions and scoring scales if you can
Ad hoc surveys might be the opportunity to incorporate new questions/new sub-groups, in order to find out about specific issues or adjust to changing labour market
Measure according to the same organisational units (e.g. regions/local offices) wherever you can
Transfer a good approach to other delivery channels (e.g. digital) wherever possible to try to achieve comparability
Use national/legal frameworks as a point of reference
Develop an appreciation of best practice from other EU PES
Aim for consistency with other benchlearning frameworks notably on performance measurement
Build on the key service components of timeliness, accessibility, respectful treatment, reliability of information provided, and expectations being met

TAKE YOUR PES TO THE NEXT LEVEL

If your PES has more experience in the area of designing CSM systems, you may wish to consider introducing these more advanced approaches and techniques

Remember that a classic 'Likert scale' is designed to be a bipolar scale – measuring positive and negative answers to given statements. In some cases, however, it is advisable to use an even-point scale (e.g. 4-point scale) where the middle option has been intentionally deleted. In this case, the so-called 'forced-choice method' is used, which does not allow for the selection of neutral answers as an easy option for those undecided respondents. However, this option has to be carefully used as it might limit the answer options for those respondents who are truly undecided.

For the analysis of large qualitative datasets, it is advisable to use one of the available data analysis software tools that support transcription, categorisation (coding), content search, analysis and interpretation, as well as visualisation of data. Such an approach saves time and makes the data analysis process easier and manageable.

More advanced research requires the tools to be tested for reliability and validity. More information can be found in the following link here.

PRACTICAL TIPS

Designing the questionnaire

Keep it simple: simple, short questionnaires and questions are more effective.

Start with closed-ended questions: while open-ended questions provide richer data on customer perception, they require additional resources for analysis. Closed-ended questions are easier to analyse and compare.

Use similar rating scales for all satisfaction measurement questionnaires: it will allow you to compare results between different target groups (e.g. for employers and jobseekers) and services offered by your organisation (e.g. placement, counselling, online services, benefits payment, etc.). Graded questions permit obtaining objective information to regularly compare the improvements and challenges for the future.

Use well-known rating scales: it is vital that you use the rating scales to which your customers (as well as employees) are used to! One of the rating scales that people get most acquainted with and understand best are those used in the education process (school grades).

1.3 Designing CSM Tools

1.3.1 Choosing tools and methods used for CSM in PES

You can conduct CSM with the use of **different research methods**. These include:
- computer-assisted web interviewing (CAWI);
- computer-assisted telephone interviewing (CATI);
- computer-assisted personal interviewing (CAPI);
- focus group interviewing (FGI);
- social media;
- action research;
- real-time feedback;
- customer message boards.

The overview of these possible options, with their key considerations is provided in Annex 2 (Table 6).

For example in the German PES, different approaches used to measure customer satisfaction include:
- regular telephone surveys, conducted by the Centre for Customer and Staff surveys;
- special customer surveys for the acceptance and optimisation of the IT Platform;
- case-related complaints or positive appraisals, which are periodically evaluated; and
- feedback regarding the online channels, obtained from face-to-face contact.

1.3.2 Choosing the types of questions for measuring CSM

The most common types of questions are **graded questions** (with a scale), which you can use, both in relation to jobseekers and employers. The most commonly used rating scale is the so-called 'Likert scale', which is a psychometric scale based on the level of disagreement and agreement with the series of statements. While the span of the scale might differ, a 5-point scale is most commonly used (strongly disagree; disagree; neither agree nor disagree; agree; strongly agree). Other odd-numbered scales are used (e.g. 7-point scale).

You can also use **multiple-choice questions** – with the so-called 'cafeteria' of answers, as it provides a better overview of factors that might influence customer satisfaction. Using graded questions delivers important quantitative information, saves time during the interviews and makes analysis of results easier.

Designing the questionnaire: what does good practice look like?

Begin with a short introduction in which the aim and scope of the survey are defined and instructions on how to fill in the questionnaire or where to look for help or additional information are provided.

Questions should be grouped and organised according to a logical order – referencing to key service dimensions without directly stating which dimension it relates to (this information should be at the disposal of the analytical team at PES).

Questions need to be appropriate with the target group analysed – this means that even when the same issues are analysed in relation to jobseekers and employers (e.g. information provision), they often need to be tailored to resemble differing scopes of services provided to those different groups.

Questions should be formulated in a precise way – there should be no room for misinterpretation or ambiguity as the answers provided by different respondents may vary, limiting the generalisation of the research findings.

For more insight and to provide additional explanation in addition to the obtained scores, you can also use **open-ended questions** in CSM. These provide better understanding of the level of customer satisfaction and customers' needs, as well as reasons for dissatisfaction, if this is the case. However, this type of data (descriptive, non-categorised) is much more demanding to analyse and, in cases where you get a large number of answers, it might require using qualitative data analysis software tools.

You are advised to use the right mix of question types that is in line with the aims of the survey, its content, target group, scope and type of information that needs to be gathered, as well as data analysis capacity.

For reference, Annex 3 is a sample of satisfaction measurement questions for the two main target groups: jobseekers and employers. This template is designed to get you started and act as a point of reference while drafting your own, service-specific questionnaire. Please feel free to modify and use the questions (or set of questions) that best suit your particular needs!

A **sample questionnaire** for individual customers and the employer survey questionnaire from the UK PES can be found in Appendix C of the annual report.

Step 2. Implementing the Customer Satisfaction Measurement System

KEY HIGHLIGHTS

In this step, you will learn:

- how to organise and optimise the process of data collection and analysis, in terms of responsibilities, use of supportive technologies and software; and
- how to best report the results of customer satisfaction measurement, both to internal and external audiences.

KEY MESSAGES

Assess your PES capability before deciding whether to design, implement and run your CSM system within the PES, out-source it or combine a mixture of the two:

- think through how you will report the CSM results within the PES, to ministries and the public – and consider the possible reactions;
- decide at the start of the implementation process how you will align or integrate CSM within existing and planned performance management processes.

2.1 Data collection and analysis

Today, public services increasingly require **evidence-based decision making** as part of their strategic management and reform. This means that for your PES, customer satisfaction measures can be an important source of evidence. However, **collecting** good data is not enough – the data also needs to be effectively **analysed** in order to inform decision making. You therefore need to develop a systemic approach to gathering and understanding data. Moreover, as this aspect of customer satisfaction measurement can be costly and complex, it is vital for you to understand the possibilities and constraints of this process.

Reliable CSM requires a standardised system of data collection and a set of comparable indicators that can be measured periodically to detect trends. This is important, albeit more complicated for regionalised and localised PES. Continuity in research methods and data collection ensures sufficiently comparable information for time series.

Integrating data collection into internal PES structures and systems and aligning systems requires investment – but is highly advisable and desirable.

2.1.1 Deciding on whether to outsource or keep data collection and analysis in-house

An important area for reflection is the resources and specific expertise you require **to make good use of customer satisfaction data**. In particular, you need to align the capacity of your PES with its ambition by weighing up the outsourcing possibilities and constraints, alongside the internal resources and costs of investment (in staff capacity, software, etc.).

A key decision that stems from this reflection is whether you keep the data collection and analysis in-house or whether you sub-contract to an external organisation. A related decision is whether this concerns the whole process or parts of it. Ultimately, your decision should be based on a careful consideration of your PES' internal resources and capacity to perform such a process. You also need to take account of your internal structures. For instance, if your PES has a specialised unit/department responsible for CSM and service quality assurance, it could be possible for you to retain at least the main part of this process internally.

The **pros and cons of the outsourcing and in-house approach** are presented in the table below.

Table 2 Data collection and analysis in PES – outsourcing or keeping in-house?

DATA COLLECTION AND ANALYSIS OPTION	👍	👎
Outsourcing	Outsourcing data collection and analysis might be an effective way of optimising resources and cutting fixed costs (as technical expertise on data gathering and analysis is unlikely to exist in smaller PES). Outsourcing is especially useful in relation to data gathering (fieldwork). Outsourcing analysis an also provide a chance to learn and acquire external/missing knowledge. There may also be greater acceptance of the results (as they are seen as more neutral and reliable – as the clear independence from the PES in capturing datais retained).	Effective outsourcing requires almost the same level of knowledge of CSM on the side of the PES, as it relies on a proper definition of the scope of the work to be outsourced, as well as continuous control of the quality of the deliverables. Therefore, outsourcing is not always the best option for 'beginners' in CSM. Cost of commissioning and contract management can be high. There might also be a lack of flexibility or responsiveness in picking up changes, which are not written into the contract.
Keeping in-house	A good option for PES with extensive knowledge and a large team who can better control the process – especially in relation to data analysis.	Expensive, especially in relation to fixed costs. It could be argued that if the whole process is performed internally, a very low level of 'public' control is retained and the results might be questioned.

2.1.2 Using technology to facilitate the data collection and analysis

When thinking about data collection and analysis, it is important to be aware that technological developments affect the possibilities available to your PES. In particular, **new technologies and software can help to increase response rates** and gather more specific sets of information. They can also align better with the tendency towards more 'self-service' methods; for example, customer feedback can be gathered automatically through the use of online (or mobile phone) applications.

There is a **broad range of supportive software** that you can consider and/or use to facilitate the process of data collection and analysis, including:

- statistical software;
- qualitative data mining and analysis tools;
- business intelligence/performance management support tools; and
- customer relationship management software (CRM).

An overview of **pros and cons and preconditions for using this software** is provided in Annex 2 (Table 5).

Current practice shows that only a minority of PES use supportive software for the measurement of customer satisfaction, usually to support individual elements of the process (for example, to design a web-based questionnaire or perform basic analysis of data). That is not to say you should discount these tools, but more that they need careful consideration.

Another point to consider is that if particular technologies are being used, they may influence other aspects of the CSM design; for instance, when gathering data through online/mobile devices, the format and content of the survey questions need careful design to ensure ease of use (e.g. shorter forms, simpler questions).

2.1.3 Optimising the data collection and analysis in other ways

There are other important considerations when collecting and analysing data, which go beyond who undertakes the work and what technologies to use. These considerations relate to the finer issues of implementation that can save time, effort and lead to better results. In particular:

Data gathering and analysis: what does good practice look like?

Coordination of data sharing between co-providers of public services in a service system: in cases of different providers serving the same customer, the 'journey' approach is desired, but it makes coordinated data sharing and interpretation more complicated.

Cross-reference of data from different public sources: in many countries, the need arises to combine administrative and survey data in order to better understand customer experiences, as well as put satisfaction results into context.

- Getting a satisfactory response rate is often a concern for PES managers. It is important however to decide upfront **what response rate is sufficient** to give you confidence in the conclusions you draw. Once that level is reached, it is best not to devote unnecessary effort trying to raise response levels beyond that point.
- The most effective way of keeping response rates at a useful level is to **gather data where possible** during actual service delivery. For example, a PES office could ask towards the end of an employment adviser interview: 'Can I ask you a few questions about how satisfied you are about your recent contacts with us?'

PRACTICAL TIPS

How to achieve comparability, reliability and standardisation of data

Develop a common and consistent approach over time and across the whole PES as operating models change and new programmes emerge.

Maintain the same portfolio of core questions across organisational units and over time. This is essential to establish and understand trends and to track the effectiveness of improvement actions.

If there are needs for **specific data streams** at a certain PES level or for a specific customer group, **build them into the overall PES approach** rather than replace them.

Where policy constraints allow, **be as open as possible with the data**, both within the PES and externally. Open data will become trusted data and helps you respond to service problems with a supporting evidence base.

- Wherever you can, make **data collection automatic**. Ideally customer input is fed directly into an electronic system (web page or a dedicated part of an operational IT system). Alternatively (although more expensive), a customer completes a paper document which is then sent to a central data-input facility. Input by individual staff is swift and cheap, but at risk of result manipulation.
- **Collation and high-level analysis of results** before publication (internally or externally) is usually best done by one specialised department, often a national unit. This approach achieves economies of scale and acts as a centre of expertise within the PES.
- Using different questionnaires and scales for customer satisfaction measurement often requires **alignment to ensure comparability for benchmarking purposes**. Different (even and odd) rating scales might require the collation of all 'positive' and 'negative' results in order to ensure the comparability of data. For example, in relation to the PES benchlearning process, the ICON Institute recommends to omit the neutral value (for odd scales) and recalculate responses as if they make up 100%, with the shares of this number representing relative satisfaction and dissatisfaction score (ICON-INSTITUTE, 2015, p.14).

Keep in mind that data protection rules in some countries can limit the capacity of the PES to gather and produce in-depth analysis on customer satisfaction. You have to carefully analyse and take into consideration any national regulations in this field before you start gathering data, in order to prevent any legal disputes.

An interesting example of data analysis and interpretation can be found in the UK PES. This PES measures employer satisfaction through an 'Employment Engagement and Experience' survey conducted annually through an external research organisation.

2.2 Reporting on the CSM results

2.2.1 Determining the use of the CSM results

Once the CSM data is collected and analysed, you can **present and disseminate the results in different ways**. Possible uses of such information include:

- understanding how the PES services are delivered and how they are perceived by customers;
- improving the quality of service delivery (design, delivery and accessibility);
- supporting organisational learning and development (both of systems and staff); and
- supporting performance management, thereby feeding into a wider PES strategy.

Before wider (internal and external) dissemination of the results, it is important to **assess your PES' readiness** to receive and use such information by determining if:

- PES managers at all levels (and regions) will be eager to accept (sometimes negative) feedback;
- the PES culture is ready to embrace the potential introduction of change, based on customer satisfaction results;
- all results are informative, justifiable and have the potential to be translated into operational improvements and changes; and
- the PES is ready to communicate the results back to customers (and accept potential critique).

EXAMPLES

Informing-improving-influencing model*

The **informing-improving-influencing model** reflects the range of possible uses of customer satisfaction outputs (from simple reporting to satisfaction outcomes influencing change within PES) and the potential of satisfaction results in the wider PES performance management process. The steps in the model include:

Informing – considers using results for information purpose, including existence of standards on how the results are used and how these are disseminated internally and to the public.

Improving – considers using results to improve the quality of service, including existence of standards on how the results are used to improve different aspects of service delivery.

Influencing – considers using results to influence the design/operation of services in PES, including existence of standards on how the results are used within the wider operational management cycle to improve overall PES performance.

* This model is further explained in the *Analytical Paper* 'Increasing PES effectiveness by meeting customer needs'.

Publication of customer satisfaction survey results by the German PES

The German PES publishes the results of its customer satisfaction surveys on its intranet; some of the results are also disseminated publicly online. In addition, the results relating to particular topics are included in the PES's target measurement system; correlations with hard indices are also made. Overall, these approaches help to improve the PES's work and cooperation, as well as its whole product range.

2.2.2 Choosing the method(s) to disseminate the CSM results

You can use a **variety of methods** to disseminate CSM results, including:

- Internally available customer satisfaction results can consist of: executive summaries, general reports and detailed, specific analyses. This approach accounts for data sensitivity and makes further explanation(s) available to the general public, as needed.
- General reports presenting key findings and executive summaries of findings can also be communicated externally, but should provide important background and descriptions of the methodology used so that the research findings are presented in the wider context.
- Reports on specific problems (e.g. evaluations on separate problems for target groups of customers) and reports on customer complaints can mainly be used internally to inform quality improvements and assurance processes.
- The most important use of CSM results is for the **purposes of improving service quality and performance**. This requires internal distribution of findings not only by dissemination of reports, but also through the following activities:
  - organising internal conferences and seminars for staff (management and non-management), where findings as well as proposed corrective actions are presented;
  - organising internal training and peer learning sessions in order to share practices and ideas for improvement on the basis of the results; and
  - preparation and presentation of internal manuals and guidebooks on improvement of customer satisfaction that cover good practices.

EXAMPLE

Civil Service Customer Satisfaction Survey in the Irish PES

There is a growing body of interesting examples of **how to communicate customer satisfaction results to the public**. The Irish Ministry for Public Expenditure and Reform publishes results of their annual Customer Satisfaction Survey on their website in the form of:

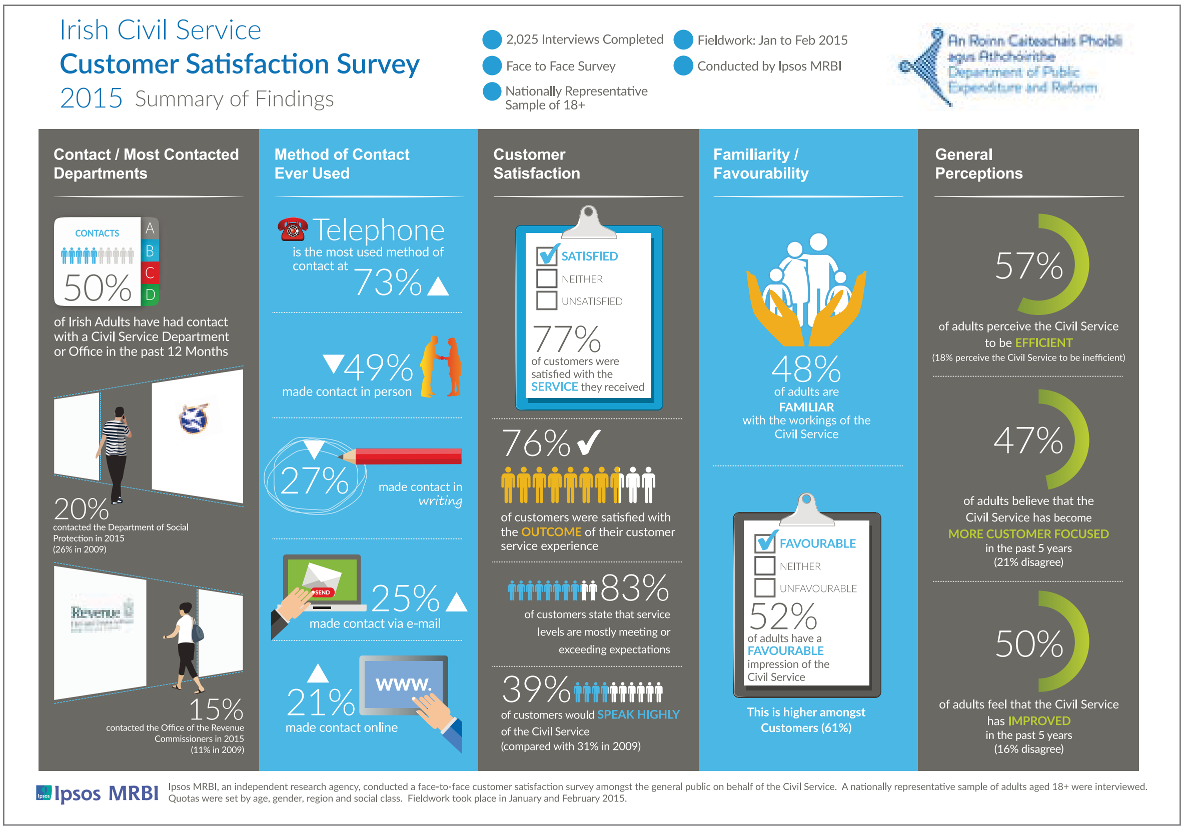
Short press releases summarising the key results in the areas of: contact, satisfaction, attitudes and perceptions;

- full results of the survey;
- summary version of results; and
- infographics.

Your **ability to communicate the results** in a way that is tailored to the needs of the audience will be key to successful dissemination of your CSM results. This might mean using **different approaches for different target** (internal and external) audiences, such as:

- short 'memo' style notices and key indicators for senior management;
- full methodological reports for 'operational' staff directly dealing with CSM and links to service quality assurance and performance;
- 'key message' reports for other staff that highlight operational messages and motivate them to undertake additional efforts to increase customer satisfaction; and
- user-friendly information for the wider public to promote service accountability to citizens in delivering quality public services (e.g. using infographics as presented below).

Figure 1 Example of infographics of customer satisfaction survey results in the Irish PES



PRACTICAL TIPS

Reporting of results

Carefully consider how to report survey results within the PES. Best practice is to **embed this into existing performance reporting arrangements** so that data and headline outcomes are brought to the attention of senior managers systematically and regularly. The Performance Measurement Toolkit provides detailed guidance. Relevant examples can be found in Austria and France.

Frontline delivery staff and managers will want to be aware of the results for their unit and how they compare with national and regional results. It is advisable for PES to produce a **simple guidance note for their staff**, setting out how the data is collected and how to interpret it in each organisational unit. **Local management and staff meetings** are often a good vehicle for positive discussion and identifying areas for improvement.

Publication of results outside the PES will usually be a matter of national policy. If policy permits, publication of customer satisfaction results is often **appropriate for the PES' published annual report** where there is one, with accompanying explanatory text.

Survey results usually require some expert analysis and linked text on interpretation. Dissemination within PES should therefore be **structured around a simple timetable that permits this analysis**, rather than be driven by a desire for speed. The exception might well include availability of results to Government Ministries (where appropriate) where national policy considerations around sharing data and results across Government institutions may apply.

In some countries, the need for **greater transparency in public services** has led to collecting and sharing information more openly (e.g. through online platforms where the data, including customer satisfaction, are freely accessible). Consider whether your PES is in one of these countries and act accordingly.

EXAMPLE

Integrated approach to measuring customer satisfaction in the UK PES

The UK's Department of Work and Pensions (DWP) has a very integrated approach to CSM, including a wide range of data from different data sources. The following actions take place within DWP to measure the performance of the organisation in general and to specifically measure Jobseekers Allowance customer satisfaction:

DWP's Operations Integrated Scorecard: high-level measurement of quality and customer service. Forms part of a range of measures used by the Operational Executive Team.

DWP's Operations Quality Dashboard: measurement of quality across different products; used to drive improvements in service delivery.

Quarterly customer survey of a sample of customers who have had contact with DWP, including jobseekers. The fieldwork and some analysis is outsourced to a research organisation.

A **dashboard** analysing local performance and across the customer journey is produced from the survey data on a quarterly basis.

***Ad hoc* local surveys and real time feedback** from customers after a transaction conducted by Jobcentre Plus.

Annual survey of employers: fieldwork and research report contracted to external organisation.

Online satisfaction questionnaires for customers using a digital service.

TAKE YOUR PES TO THE NEXT LEVEL

*If **your PES has more experience in the area of designing CSM systems**, you may wish to consider introducing these more advanced approaches and techniques*

The move towards a holistic approach to data gathering and analysis is desirable. For example, large and diversified data sets need to the integrated and simple statistical software should be complemented with specialised tools (e.g. quantitative and qualitative data mining tools, customer relationship management software) in order to fully utilise the existing data.

Communication of results is key to success, but difficult to get right. For more advanced PES, it is vital to use more advanced ways in which the information is disseminated internally by incorporating it into scorecards or dashboards that translate results into operational and strategic success/performance measures. Communicating results can be a good way to motivate staff; PES can use rankings (league tables) to encourage them to put more effort into achieving higher results.

More advanced PES should use customer satisfaction measures in more than simple reporting. They should aim at a more dynamic use of data, using results to inform PES managers and staff about their **performance**, introducing **improvement**s in PES services, and **influencing** PES decision making to design more efficient services.

2.2.3 Managing other aspects of dissemination

One additional issue to consider is the **speed with which you disseminate the results** – both internally and externally. Generally, it is advisable that you disseminate the data (and reports) as soon as the final (and carefully double-checked) version is available. The shorter the time-lag between data gathering (and the service provision it relates to!) and publication of results, the greater the possibility of making informed decisions towards the improvement of the services.

However, as customer satisfaction **data might be used for different purposes by various users**, the speed of dissemination has to be clearly aligned with this differentiation. For example:

- if the government ministries use customer satisfaction data for national (yearly) reporting, data must be readily available at the time of internal preparation of documents; or
- if the PES managers are using the data for performance management at the office and/or individual level, these need to be available before the assessment/feedback process.

As a final reflection, it is worth considering how the dissemination of the results – as well as the underpinning data collection and analysis – can be developed to form an **integrated approach to measuring customer satisfaction**. A useful illustration of this is given below.

Step 3.
Monitoring, evaluating and improving the Customer Satisfaction Measurement System

KEY HIGHLIGHTS

In this step, you will learn:

- in what ways the process of CSM in your PES can be continuously improved;
- how to use the data obtained to improve the services by securing management support at all levels (from operational to strategic); and
- how to link the results of CSM to existing and newly developed performance management systems and metrics.

KEY MESSAGES

- Carefully consider how you will build and maintain buy-in and engagement of PES managers and staff in your CSM system.
- Decide whether the data and results produced by your CSM will form part of your performance review system.
- For each organisational level and function, decide how you will act on the results in improving local or front-line service, driving operational change, and designing new policy.

3.1 Improving the process of CSM

Measuring customer satisfaction is a learning process in itself. As such, it will never be perfect and needs constant improvement. Regular review of your CSM process using a **cycle of continuous improvement** as set out at the start of this toolkit is recommended. Reviewing progress, at least annually, is effective in maintaining momentum and giving your PES the opportunity to improve. CSM progress review can be a special project in its own right, but (if possible) reviewing it as part of your PES' planning cycle will help to embed customer service improvement into all activities.

Improvements can be made not only to the PES activities (as described in Section 3.2), but also to elements of the CSM process. Every time CSM data is collected, important knowledge is gained, which can help improve either your whole CSM approach or specific elements of this approach.

Setting up quality assurance procedures are essential, even if they are just a simple set of rules or actions for gathering feedback.

As a minimum, these **procedures should include:**

- internal quality assurance procedures: gathering feedback, formal quality assessment/control procedures, etc.;
- external quality assurance procedures: ISO, external support/evaluations, EFQM assessments, etc.;
- flows of data that enable different organisational units/levels, services or customer groups to be compared in terms of expressed satisfaction levels;
- thinking about your early results as a baseline for further improvement and to set expectations for delivery/operational managers around the nature and pace of improvement you require;
- policymakers and designers of new products/services using CSM data as it emerges as a key improvement criterion; and
- aligning and support for your PES operational labour market priorities.

Do not change all procedures at the same time. People usually need time to get used to new procedures and approaches, so **plan the envisaged changes and communicate them to affected staff**. This method should help staff understand and accept the changes to the CSM process more easily.

PRACTICAL TIPS

Improving the process of customer satisfaction measurement

Almost all assessments of the processes/programmes follow the same set of key evaluation criteria: adequacy, effectiveness, efficiency, impact and sustainability. These can also be applied to the assessment of the CSM process.

No improvement is too small to implement – in many cases, just small adjustments of the process might significantly improve the functioning of the whole system and impact overall process effectiveness.

Make all of the employees responsible for (and engaged in) the process of improvements to customer satisfaction measurement. Good ideas and innovations are often generated by staff not directly involved in CSM.

Preparing the meeting with staff on CSM introduction

You should always prepare before the meeting with staff to explain the changes that will be introduced through the CSM system. While preparing the meeting, remember to:

- plan (and inform early) the right time and place for the meeting;
- try to assess what your staff already know on the planned changes and what general concerns they have;
- prepare carefully what you want (and what you don't want) to say in relation to the CSM introduction; and
- try out your statement before the meeting.

At the meeting, do not overload the staff with new information, but take note of any questions and concerns that arise that can be addressed later (and remember to address them afterwards).

When making changes to the process of CSM, be conscious of the consequences these changes can have in terms of possible discontinuity of methods and the differences and gaps in the datasets which result.

3.2 Using customer satisfaction results in service improvement

3.2.1 Securing support from management and staff buy-in for CSM

Securing support from management and staff buy-in[11] is crucial in any organisational initiatives involving change, including improvement through a CSM system, which is one of the basics of change management. All organisational changes affect people and require them to change their daily work routines. Therefore, people often oppose change, which might result in unsuccessful implementation of change through CSM.

Change management is always a process - but one that is not strictly definable and not always following ready-made schemes and procedures. In this case, the role of management is vital. Organisational leaders are always responsible for:

- initiating change;
- authorising changes and their consequences;
- preparing the team to go through difficult changes;
- helping the team to develop new targets; and
- supporting and keeping up motivation for changes.

An engaged manager serves as a role model for all other staff. However, in order for changes to be successful, all staff need to get engaged in the process. The key tool needed to increase staff buy-in for the introduction of the CSM system (or the changes to the services as a result of CSM process improvement) is communication. Effective communication in the **change process is focused** on:

- understanding the need for changes (Why do we need this change? What will be the benefits for the service and the clients?);
- understanding the process (How are we going to proceed? What will change and how? How it will affect my work?);

11 This refers to both support of the staff and an active participation in the introduced changes.

- understanding the joint responsibility (How can I contribute? What will be my role compared to others?); and
- understanding how to deal with difficult situations in the process (What should I do if there are problems? Where can I turn for help?).

In this way, staff concerns might be effectively addressed and the implementation of the process will be facilitated.

As explained earlier (Section 1.1.4), you will need an **implementation plan** to successfully introduce CSM into your PES. The same factors are critical in embedding support. They include:

- a consistent flow of trusted data to those who need to act on it (this will include most managers in the operational delivery chain from local sites to the national level);
- competences (i.e. relevant skills and knowledge) in place among those receiving the data to use it to make service improvements in their area of accountability;
- a proper decision making architecture of reviews so that policymakers consider why some programmes 'score' better than others in CSM terms;
- a consistent approach across service delivery channels so that debates about how customers use and/or are satisfied with channels are fully evidence-based; and
- publication or dissemination of CSM data to key external stakeholders, especially in Ministries to enrich their understanding of what works.

The central task in successfully introducing CSM into a PES is to embed it in day-to-day operations so that it does not come across as an optional activity. This approach suggests **different imperatives for different groups in the PES**.

- It is important to think through how to secure support among various groups across your PES before launching a new CSM, by using customer satisfaction related measures either as a performance measure or a target.
- For front-line delivery staff, measuring and improving customer satisfaction relates closely to personal job satisfaction, which in turn builds commitment and motivation.
- When operational managers value CSM, staff engagement may increase, enabling the comparison of organisational units and identifying areas or customer groups where performance improvement is needed.
- At the national level, senior managers will find CSM delivers useful data over time to compare delivery effectiveness across different service channels, in wider service and policy development, and in building PES reputation as a valued service provider.

3.2.2 Linking customer satisfaction and other performance metrics

The key aim of CSM is the ability to improve the services on the basis of obtained results. In the case of public services, customer satisfaction is often perceived as a good proxy measure of effectiveness and is a part of the overall performance matrix. As such, **CSM needs to be an integral part of a wider set of key performance measures**.

This aim can be achieved through:

- including customer satisfaction in strategic management systems (e.g. Balanced Scorecard, Performance Dashboard);

PRACTICAL TIPS

Aligning customer satisfaction with performance management

In designing the link between the systems of CSM and performance management, make sure that:

- Your customer satisfaction system is fully aligned with the wider performance management system. Best practice usually means that the two systems are managed and developed by the same community of experts, produced to the same timescale (though not always to the same frequency), and reviewed by managers in the same cycle of performance review meetings.
- You have reviewed your PES capability in this area. Key points to consider include whether you have checked the level of understanding of the new measures amongst managers and staff as well as whether there is an appropriate degree of local autonomy or flexibility to respond with service improvements at a local level.
- You have checked the expectations of your senior managers and possibly ministerial colleagues on what new CSM data flows might tell them about the PES service delivery.

EXAMPLES

A 'balanced' approach in the UK PES

In the UK PES (Department of Work and Pensions – DWP), the **Balanced Integrated Scorecard** is the most important reporting tool used and includes the measures for quality and customer service. This scorecard includes data on performance across the DWP's wide range of services (such as pensions, Jobseeker's allowance – JSA, disability benefits, etc.). The approach is called 'balanced' because outcomes are measured at the same time as quality and other variables are looked at.

In terms of the hierarchy of targets, the following **performance areas** are equally represented within the Balanced Integrated Scorecard: **spending** (financial perspective), **quality** (measured by customer satisfaction and compliance with the processes) and **the people within the organisation** with a focus on learning, growth and leadership**.**

With regards to learning and growth, the following question is asked: '*Do we have the people with the right skills in order to deliver what we need to deliver?*'

With regards to quality and more specifically customer satisfaction, the question DWP focuses on is: '*Does our approach lead us to achieve what we intended in terms of delivery of a quality service in part measured by customer satisfaction?*'

Quality Measurement at top level

Three main areas of performance are being measured at the top level. These are:

- Accuracy of benefits: is there underspend or overspend?
- Process compliance: are staff being compliant with the required processes and instructions?
- Level of complaints: number of complaints against the benchmark.

Measurement at the product level

Whereas the Balanced Integrated Scorecard presents performance across the range of services provided, the **quality dashboard presents performance measurement at the product level**.

A colour coding* is applied to the front page of the dashboard allowing for an immediate assessment or 'headline narrative' on which areas need most attention in terms of performance improvement, with:

- red coded areas performing the worst;
- orange coded areas performing more or less well, but would need to improve; and
- green coded areas performing well.

This **colour coding is used to drive improvements necessary** and the main focus is on the red coded areas. On the basis of forecasting tools, it is predicted what the expected end-of-year position will be based on current trends. Secondly, on the basis of business intelligence, the PES assesses what needs to be done to move outside of the red area (e.g. a redeployment of resources might be necessary).

* The colour coding is a risk based approach. Red rating means that performance standard is not achieved, amber means performance is achieved within a certain percentage of standard whereas green means performance is meeting the standard.

- embedding customer satisfaction metrics in quality assurance system as one of the key indicators and sources of information (e.g. internal quality procedures, ISO);
- including customer satisfaction-related targets in the performance management systems for managerial staff (e.g. in management by objectives – MBO approach); and
- including customer-related behaviours in performance reviews/competency profiles and individual performance appraisal of staff.

Some PES in Europe are already effectively using the CSM data in performance management systems – usually at strategic level. An interesting example of **using a Balanced Scorecard (BSC) in strategic management** of the service is provided by the Austrian PES. This management tool has been used effectively since 2005 to objectively compare PES organisational units against each other on the key principles of the PES mission statement. More information on this practice can be found here.

Key challenges for aligning customer satisfaction with PES policies/performance targets and organisational processes include:

- ability to interpret the obtained data and understand the actions that need to be taken in order to improve (and then to 'translate' these into achievable targets);
- ability to define the targets for performance appraisal on the basis of customer satisfaction within a complex matrix of other public and political demands and expectations;
- ability to disaggregate the influence of individual staff influence on the overall satisfaction of clients, and corresponding ability to observe and direct such influence;
- indirect and complicated causal relationships between service offer and CSM (which depends on a number of different factors).

3.2.3 Using customer insight at operational and strategic levels

The key theme for PES managers on operational and strategic levels is how well the systems for performance management, staff allocation and customer satisfaction measurement are aligned. As a first step, the **data should be available to the relevant accountable managers** through a common organisational structure.

Access to information drives key discussions about how and where resources are both used and distributed. For each PES, **important choices will have to be made about the degree of managerial autonomy** at each level to redistribute resources, adjust service parameters and build capability. Senior PES leaders' assessment of the right balance between conforming to a national model and local improvement flexibility is crucial during this step of the process.

CSM will be more effective (and widely accepted) when the outputs of the measurement (customer insight) are used to review and revise operational delivery systems, operational processes and policy design assumptions.

Generally, **at the operational level**, customer insight might be used to:

- understand operational deficiencies of the services and the areas that need to be improved;
- define short term operational goals based on the key challenges identified;
- communicate achievements and needs for improvement among staff and wider audience (if relevant); and
- define needs for staff training and development in relation to customer satisfaction.

At the strategic level, customer insight might be used to:

- inform strategic steering documents and allow for long-term planning;
- build common organisational understanding and appreciation of customer satisfaction as one of the key values for the service;
- support overall (strategic) change and rationalise the need for it to policymakers; and
- further develop services with the use of the co-production (co-design) model in which customer insight plays a key role.

A detailed overview of the current approaches to performance metrics at the operational and strategic levels used in the public sector and PES can be found in the Analytical Paper on Establishing and operating performance management in PES.

In terms of **effective and informed resource allocation**, it is important to find the right balance between:

- Strategic and operational perspectives: information obtained from CSM is important at both levels. The more operational data used, the greater the requirement for detailed information (disaggregated to local units level, short-term/immediate response, etc.), which in turn affects the design of the system and its costs. If the strategic perspective prevails, the level of data gathered might be too general and abstract to make operational improvements.
- Efforts put into data collection, analysis and usability of this data for the improvement of services. As PES often function under budgetary constraints (limited resources, including staff available), there is a need to build CSM systems that are 'fit for purpose', in which the data collection and analysis is not too cumbersome for the people involved and too costly for the service. Put simply, the benefits must outweigh the costs of the system in terms of providing the customer insight that is worth the money invested.

TAKE YOUR PES TO THE NEXT LEVEL

*If **your PES has more experience in the area of designing CSM systems**, you may wish to consider introducing these more advanced approaches and techniques.*

Strategic customer satisfaction metrics need to be fully integrated within a chosen system (BCS, Dashboard) and cascaded down to inform performance expectations of individual PES staff (desired targets, behaviours, attitudes). This would allow for the organisation to offer more personalised support to staff to enhance customer service.

Making more 'evidence-based', well-informed decisions comes with the organisational maturity to accept the (not always positive) feedback. However, it requires developing an organisational culture in which data analytics displace managerial beliefs based on past experience.

Integrating all of your human resources management practices (including recruitment and selection, training and development, performance management, rewards and remuneration system) to build a system that supports an organisational culture of integrating people around values stemming from customer satisfaction measurement.

Reference list and further information and resources

Reference list

- Department for Work and Pensions (2014). *DWP Claimant Service and Experience Survey 2013*. Available at https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/364302/rrep884-research-report-dwp-claimant-survey-2013.pdf
- European Commission (2014), *Blended service delivery for jobseekers*, Brussels. Author: Willem Pieterson.
- European Commission (2016), *Increasing PES effectiveness by meeting customer needs – Analytical Paper,* Brussels. Author: Łukasz Sienkiewicz.
- European Commission (2016), *Establishing and Operating Performance Management in Public Employment Services,* Analytical Paper, PES Mutual Learning. Author: Professor Timo Weishaupt.
- European Commission (2013), *Review of Performance Management in Public Employment Services,* Brussels. Author: Alex Nunn.
- European Commission (2013), *Targeted services for employers – Toolkit,* Brussels. Authors: Helen Tubb, Isabelle Puchwein Roberts, Helen Metcalfe.
- *European Parliament and Council Decision No 573/2014/EU of 15 May 2014 on enhanced cooperation between Public Employment Services (PES), annex.*
- ICON-Institute (2014). *Guidelines for PES Data Collection and Data Entry*, p. 14.

Further information and resources

The sampling process, use of statistical models and survey for CSM

- http://www.fairfaxcounty.gov/dmb/performance_measurement/survey_manual.pdf
- http://www.eupan.eu/files/repository/20111230120429_Measure_to__Improve.pdf
- http://www.tns-bmrb.co.uk/uploads/files/iips-insight-customer-satisfaction-toolkit.pdf

The German Centre for Customer and Employee Surveys (ZKM)

- https://www.arbeitsagentur.de/web/content/DE/Veroeffentlichungen/Befragungen/index.htm

The Irish Ministry for Public Expenditure and Reform – Results on Civil Service Customer Satisfaction Surveys

- http://www.per.gov.ie/en/minister-for-public-expenditure-and-reform-publishes-results-of-civil-service-customer-satisfaction-survey-2015/

Reliability and validity testing

- http://www.socialresearchmethods.net/kb/reliable.php

In addition, the PES practice examples cited in this paper can be found on the PES Practice Repository.

Annexes

Annex 1. An action plan needed for the development and implementation of CSM in your PES

- While you work on the development of your CSM system and set out an action plan, refer to the checklist below to check whether you have taken all important actions. Please remember to have all the boxes under one Step 'checked' before moving to the next one.
- This template will also allow you to draft other points important for your action plan, including division of responsibilities, resources needed and deadlines for each task.

	Responsible person	Staff engaged	Other resources/support needed	Deadline
STEP 1 METHODOLOGICAL CONSIDERATIONS IN DEVELOPING CSM SYSTEMS				
Clearly specified the target groups for which the CSM will be performed				
Defined and justified the frequency of CSM				
Prepared a document / instruction which defines the sampling method and sample size				
Defined the customer access channel for customer satisfaction				
Defined research methods and tools that will be used for customer satisfaction				
Defined and formulated questions that relate to timeliness, accessibility, respectful treatment, clarity and reliability of information provided, and expectations being met				
Prepared the questionnaire (including instructions) in line with the research approach chosen				
STEP 2 IMPLEMENTATION CHALLENGES OF CSM				
The purpose of collecting information from customers is clear, shared and understood across the organisation				
Senior management is involved and committed to the process of communicating the importance of customer satisfaction				
It has been clearly determined what information on the results is to be disseminated to which users, both internally and externally				
Messages used to communicate customer satisfaction are formulated in a clear language, adjusted to the target audience				
STEP 3 PUTTING IN PLACE MONITORING AND EVALUATION OF CSM				
CSM system is aligned with key strategic targets/performance measurement systems				
CSM system data flows and analysis is properly aligned with needs of key operational targets/units				
CSM helps to make informed decision/support performance of individual staff				
CSM system provides data at a frequency that managers at each level find useful				
Monitoring and evaluation procedures allow for the improvement of the CSM system by providing a cycle of continuous improvement				

Annex 2. Tables on technical aspects of CSM

Table 3 Overview of options for customer satisfaction measurement frequency

FREQUENCY			RATIONALE/CONSEQUENCES
Annually/ bi-annually	Easier to implement, as the frequency is lower, scale of gathered and analysed data is smaller. PES can better prepare the process and have time for the analysis and distribution of data. Allows for measuring long-term trends.	Does not allow for measuring short-term trends (e.g. seasonality on the labour market). As the time-lag between the use of the service and the actual survey is long, respondents might not remember and answer imprecisely. At the time of reporting some data will already be outdated.	This should be regarded as a desirable minimum standard for CSM, as it provides a general overview of customer satisfaction data and allows for analysis of long-term trends. Depending on the scale (sample, duration of the survey) it might be the cheapest option. Longer and more complex surveys are possible to undertake with larger, representative samples.
Quarterly	Allows to pinpoint short-term trends (e.g. seasonality issues) in services and customer satisfaction – and quick response. Allows for relatively short time between the use of services and surveying.	Requires more resources and organisational capabilities to handle the process. Might be costly and harder to manage as intervals of research are shorter.	Might be desirable regularity of surveying in some cases, where seasonality of labour market causes problems of customer service (and affecting satisfaction). While the organisational resources and capacity allows, the complexity of surveys might not be affected, but the timeframe of research requires prompt data analysis approach.
Monthly	Allows for the observation of just-in-time data and trends. Allows for a shorter time between the use of the service and the actual survey, which makes it easier for the respondents to answer. Large, comparable data sets are created through this regularity of surveys.	Usually requires an excellent, IT-supported approach. Might be very costly depending on the scale and method used. Samples might differ for seasonal reasons (e.g. number of unemployed registering might be different throughout certain times of the year; some services – like training - might be more important in some periods).	Usually shorter and simple surveys are required. A good way to measure customer satisfaction shortly after the services have been provided, that allows for short-term (operational) changes to be implemented.
After each contact	Allows for receiving immediate feedback from customers. Information provided helps to introduce timely/ quick changes to the failing areas, but rather of operational/limited character.	Might cause problems of comparability due to sample structure (which might differ between periods and is harder to control for). It is operationally cumbersome, and requires the use of specific channels (e-mail, telephone, text) and short (often one question) feedback forms. It is hard to make strategic decisions on the basis of this type of data.	A good method to measure timely/ immediately the reaction of customers to services – the best example of 'just-in-time' measurement.
***Ad hoc*/special surveys**	Good way of obtaining deepened insight into problems identified with the use of other surveys. More specific/ detailed questions can be asked.	Hardly comparable with other surveys due to methodological constraints. Require additional resources and capacity to perform.	Surveys focusing on specific aspects of the service or areas which were identified as problematic.

Overview of customer access channels for customer satisfaction measurement

CUSTOMER ACCESS CHANNEL			PRE-CONDITIONS
Telephone	An easy and relatively cheap access channel, which allows for usually higher response rates. This is also a good solution if you want to increase the response rate for older people with low IT skills and for vulnerable unemployment groups.	Customers might be reluctant to provide in-depth answers over telephone, so short and concise feedback can only be gathered. It is more expensive that electronic surveys.	The questionnaires (as well as questions) need to be short and performed by trained staff. The language must be kept simple and understandable to customers. Requires access to customers' telephone numbers (stationary but more commonly mobile).
Email	The cheapest channel which might be fully automated.	Usually generates low response rates (especially for linked, 'pop-up' surveys) as people tend to ignore this form of feedback request. Better results might be achieved with direct email surveys.	Requires access to customer emails.
Text message (sms)	Simple option to implement with the use of specialised software (resource effective to use).	Recent examples show very low response rates to this type of feedback requests.	Not commonly used in PES, but might be useful if short/general feedback is the aim (e.g. answering one single question on overall satisfaction). Requires access to customers' mobile telephone numbers.
Face-to-face in a PES office	Good feedback channel as contact is ensured (ease of access to the customer), which generates high response rates.	Might generate biased responses given that the dependency relation with PES staff/officer might influence the answers given.	Requires securing right conditions for feedback (no pressure on the customer, right environment, etc.).
Face-to-face outside a PES office	Similar to the above, but limits the bias due to a more neutral environment.	More costly, as additional staff/time need to be employed to perform this task.	Requires engagement of additional staff for 'exit' interviews and sometimes list of customers' home addresses.

Table 4 Overview of probability sampling for customer satisfaction measurement purposes

PROBABILITY SAMPLES	👍	👎	DESCRIPTION AND CONDITIONING FACTORS
Simple random sampling	Each individual in the sample (either jobseeker or employer) is chosen randomly and has the same probability of being included in the sample. If performed properly this allows for unbiased sampling, especially in cases where limited initial knowledge on the population is available.	In highly diversified populations, this sampling method might not provide for the perfect representation of the population, and as such conclusions on the whole population might be limited. This is best applied in cases where the population is defined as 'all PES customers', while not controlling for internal differences between kinds of services provided or cases being addressed.	Simplest of probability sampling techniques. It is best suited to sample from the relatively unknown and homogenous populations.
Systematic random sampling	This sampling method has a similar functionality as simple random sampling, but is definitely more efficient.	As in the case of simple random sampling, this method is useful for homogeneous populations, as the regular intervals do not allow for the control of respondents' characteristics. It is required to ensure that the sampling intervals do not hide a pattern that would threaten the randomness.	This is a sampling method that allows for the equal probability of selection of respondents in the sample. The sampling frame involves the use of sampling interval calculated on the basis of the relation of population size to sample size.
Stratified random sampling	This method reduces variance of results and allows for the weighting of results. In many cases this makes sampling more manageable for PES and allows to receive results depicting diversity of target groups in their proportions to the whole population.	As the strata need to be mutually exclusive (the element of sample must only be included in one strata) and exhaustive (all population elements must be included) it might be difficult to define subpopulations for PES service users (especially those using multiple services). Good knowledge (and data) on the population are required before the sampling.	Method useful for sampling within diversified populations (e.g. to better understand service quality for employers of different sizes). On each of the identified populations (strata) the simple random sampling or systematic random sampling is then performed.
Panel study	Allows for the observation and analysis of long-term trends and effectiveness of services, especially for some of the study groups (which can be analysed over the given time period). A cohort/panel might be defined specifically, resembling for example the most active users of services or non-users of services, and the comparisons of this group with the general population might be performed.	Limitations of this approach include the rather short-term customer relationships for some groups of PES clients (e.g. jobseekers). This limits the possibility of using this technique for short relationships. Some of the customer groups are possible to observe over time (e.g. employers as clients; long-term unemployed, etc.).	This is not *per se* the sampling method, but a form of longitudinal approach to research (called panel study or cohort study). This might be used for study of the cohort groups of individuals (e.g. by age cohort) or enterprises (e.g. panel of enterprises). Sampling for this study group is performed once, but the sample is retained for the future (next periods') surveys.

Table 5 Overview of tools and methods used for CSM in PES

TOOLS/METHODS	DESCRIPTION AND CONDITIONING FACTORS		
CAWI (Computer-assisted web interviewing)	It is an internet-based surveying technique, in which the interviewee answers the survey questions provided through a dedicated website.	Low costs (as it can be automatised), easiness of access at any time suitable for the respondent, possibility to customise due to respondents' characteristics and previous answers; shorter and easier data collection and analysis; effective if large volumes of customers are inquired.	Limited access for customers not actively using the internet (possible bias towards younger population); relatively low response rates.
CATI (Computer-assisted telephone interview)	It is a telephone surveying technique, in which the interviewee is engaged by professional interviewer, who follows the defined interview scenario (script), usually with the support of dedicated software.	Lower cost as compared to personal interviews (but higher than CAWI); immediate input of responses into the software system allowing for effective analysis of data; possibility to customise due to respondents characteristics and previous answers, better control of sample.	Hesitance of some respondents to provide feedback over the phone; need to access the interviewees at time suitable to them; limited perception of respondents over the phone, so shorter questionnaires with simpler questions need to be used.
CAPI (Computer-assisted personal interview)	It is a face-to-face surveying technique, in which computer (or tablet) is used to support the interviewing process (both for the interviewer and interviewee).	It might be used for more complex questions/issues as the respondents do not have to memorise the cafeteria; trained interviewers are able to clarify the issues/questions to respondents on the go, allowing for the more reliable answers; the results are automatically calculated and included in the database.	Cost (usually one of the highest) as interviewers need to be present in place and time indicated by the respondent; possible bias due to interviewer presence (as the respondents might feel 'obliged' to some sort of answers or might feel stressed by such presence); organisational (time and space) constraints to surveying (e.g. in relation to dispersed respondents from rural areas).
FGI (Focus group interview)	It is a qualitative research method, in which a group of (usually purposively chosen) respondents answer the questions on their opinions, perceptions and observations regarding a certain product, service or issue.	Provides an in-depth understanding of the issue in question; allows for the further formulation of the research questions, and as such is a good preparation for the quantitative research methods; might generate ideas which related to previously unobserved or new issues/approaches (so might be used for the co-development of services or raising service quality through innovative approaches.	Limited to respondents experiences so a limited possibility of generalisation of research findings; groups might be dominated by some participants/discussions might be limited.
Social media	It is not a research method, but might be a useful source for the analysis of content as well as important feedback channel. Through the review and analysis of the service users' opinions online (on social media) a number of service quality issues can be pinpointed. Additionally social media might be use to disseminate information about customer satisfaction surveys or their results.	Low cost and ease of access; wide range of possible respondents (especially for younger generations); possibility to reach non-users of services; 'viral' approach to dissemination can be used.	Usually the respondents' characteristics cannot be controlled for; might generate low response rates; usually not accessible to people with low ICT skills.

Action research	It is a research technique assuming active participation of the researcher in the process, for example by testing service provision in the form of 'mystery shopping'.	Possibility to observe the services provision in practice, allowing for the pointing to deficiencies/possible improvements.	Limited number of observations, which might bias the findings towards 'worse' or 'best' cases, not providing a full picture; high cost.
Real-time feedback	It is a way of gathering feedback on the customer satisfaction 'on the spot', during or just after the service provision.	'Immediate' feedback after the service allows for the more accurate/timely assessment; low cost as the clients are available.	Hesitance of clients to provide 'negative' feedback to service staff (especially when they also have administrative/monitoring role, as is the case for unemployed as clients); additional task for the PES staff.
Customer message boards	A way of gathering feedback information similar to (but more focused on service users) feedback from social media.	Similar to 'social media'.	Also similar to 'social media' but customers might feel more constrained to provide feedback through PES-operated website (rather than social media).

Table 6 Overview of supportive software for CSM

SUPPORTIVE SOFTWARE			DESCRIPTION AND CONDITIONING FACTORS
Statistical software	Statistical software significantly improves the process of quantitative data mining, allowing for the simple and advanced statistical analyses (including correlations and analysis of regression) as well as supporting econometric modelling. Usually is easily accessible and does not require 'tailoring' for the PES needs.	Might be difficult to use for inexperienced users. Produced reports present the outcomes that require further explanation and insight and cannot be readily used for PES management/improvement purposed.	Requires not only statistical knowledge but also training in the chosen specific software. Usually large data sets with minimum required number of observations are needed to draw statistically significant conclusions.
Qualitative data mining and analysis tools	Supports organising, managing and analysing information. Allows for the improvement and speeding up of the process of analysis of qualitative data (which can be cumbersome, especially in cases of large number of qualitative responses). Can also increase the validity and reliability of qualitative research when used properly.	Requires the existence of the software supporting a given language, due to its specificity (analysis of text in national languages) - might not be available to all PES. Might require specialised (and software-specific) knowledge and skills to be used properly.	Might cover a broad range of qualitative data mining/analysis aspects: transcription support, coding content search and analysis, data visualisation, etc.
Business intelligence/ performance management tools	This broad group of supportive software aims at the transformation of data into management-useful information/ knowledge. As such it provides better understanding (interpretation) of data in terms of (not only) influencing factors, but also for the predictive purposes. This type of software serves best the purposes of using the CSM data for the improvement of the business and PES effectiveness.	Usually requires much broader and deeper data input than those limited to customer satisfaction data. As such usually must be the part of wider management supporting perspective/ project, where CSM is only one of the data sources. Must be built around the previously agreed set of (interrelated) objectives – like those included for example in the Balanced Scorecard for the given organisation.	Business intelligence usually focuses on the data analysis (data mining) for the predictive (rather than descriptive) purposes in the field of supporting business functioning. Performance management tools focus on the analysis of data for chosen (business relevant) metrics that provide overview of progress towards targets. In both cases adequate, reliable and timely data are required to populate the systems.
Customer relationship management software	Allows to merge some customer information with (mostly individual) performance metrics. PES often use some sort of CRM (usually built for purpose) for the monitoring of clients and their use of services, so PES staff are used to using this kind of supportive tool.	Requires constant input and monitoring of data. Should be 'tailor-made' for the purpose of the given organisation/ services. Usually well suited for 'mass clients' (large databases of clients), while the depth of client interactions might not be sufficiently reflected.	This software helps to manage interactions with current (and to some extent – future or 'potential') customers. Most commonly it is currently used in telephone services (call centres) as well as other digital services (e.g. social media) to monitor and follow client contacts, offers, use of services or products, etc.

Annex 3. Sample template of satisfaction measurement questionnaire

SERVICE AREA/KEY DIMENSION	SAMPLE QUESTIONS FOR: JOBSEEKERS	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
Overall satisfaction	I was satisfied with the service provided overall.					
	I would recommend this service to others.					
	I did not experience difficulties using the service.					
Satisfaction with specific services	I was satisfied with the quality of online services.					
	I was satisfied with the quality of placement/ counselling services.					
Timeliness	Services were provided within agreed timescales.					
	My query was dealt with quickly and efficiently.					
Accessibility	It was easy to find contact details (telephone number, email address, website) for services I was interested in using.					
	Instructions and answers provided by staff were understandable.					
	Services were easily accessible (e.g. in terms of physical access and business opening hours).					
Respectful treatment	I was treated with respect and understanding.					
	The attitude of staff in handling my case was friendly and positive.					
	I feel that the privacy of my information was secured.					
Reliability of information provided	I was informed about my rights and obligations.					
	I was provided with up-to-date information on employer demands/available jobs/places of apprenticeships.					
	I am satisfied with the quality of advice/ information received.					
Expectations being met	I was shown patience and appreciation of my individual needs and situation.					
	I received comprehensive service that solved my problem.					
	I do not believe the service could be improved.					

SERVICE AREA/KEY DIMENSION	SAMPLE QUESTIONS FOR: **EMPLOYERS**	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
Overall satisfaction	I was satisfied with the service provided overall.					
	I would recommend this service to others.					
	I did not experience difficulties using the service.					
Satisfaction with specific services	I was satisfied with the quality of candidates sent to me for a job interview.					
	I was satisfied with the quality of online services.					
Timeliness	Services were provided within agreed timescales.					
	My query was dealt quickly and efficiently.					
Accessibility	It was easy to find contact details (telephone number, e-mail address, website) for services I was interested in using.					
	PES staff communicates using the language of business.					
	Services were easily accessible (e.g. in terms of physical access and business opening hours).					
Respectful treatment	The attitude of staff in handling my case was friendly and positive.					
	I feel that PES staff take personal responsibility for helping me to solve my problems.					
	I feel that the privacy of my information was secured.					
Reliability of information provided	I was provided with up-to-date information on available candidates/other options of support (e.g. subsidies, training support).					
	Information on online service offers is comprehensive and suited to my needs.					
	I am satisfied with the quality of advice/information received.					
Expectations being met	I feel that PES staff understood my needs and provided services accordingly.					
	I am satisfied with the quality of candidates sent for a job interview.					
	I was offered additional help in relation to other issues our business is facing (e.g. age management, human resources management, diversity issues).					

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