Customer Journeys & Worklessness

Key points

- Focusing on customer journeys can be key to improving outcomes in reducing worklessness, whether applied in looking at service design or in deeper analysis of customer experiences
- Not only can this analysis drive improvements in service quality from the customer's perspective, it can also unblock barriers to more effective partnership working.
- Improved understanding of customer journeys can be developed as part of structured research and consultation exercises, through improved use – and sharing - of customer intelligence, and by drawing on national research. Evaluations need to include customer perspectives and consider where individual projects or services sit in the wider delivery system and how they contribute – or not – to clients making progress towards sustainable employment and related personal goals.
- Evidence from work on customer journeys can be used as evidence for Comprehensive Area Assessment, in demonstrating a customer focus. Active user involvement in service design and review also show the Best Value Duty to Involve in practice.

Introduction

The concept of **'customer journeys'** can usefully be applied in a number of ways in tackling worklessness. It relates to ways of thinking through how individuals engage with public and voluntary sector services, especially where they follow a path which brings them into contact with a number of different services. The more obstacles they have to overcome to find and keep a job, the more services they are likely to encounter.

The term is increasingly in use in the employment and skills field, eg, in DWP tender specifications for Pathways to Work and the flexible New Deal. In essence, looking at customer journeys is a key to ensuring the provision of seamless services built round the individual not the service provider.

Customer journey mapping is one part of the 'customer insight' tool box (see separate L2D briefing). Customer insight concerns developing knowledge about service users and citizens: their needs, desires, preferences, experiences and behaviours – and applying this to improving services.

Customer journeys in integrated service design

'Customer journeys' may be used in setting out the stages of an integrated service, or in helping to see how the contributions of different organisations contribute to getting people into – and staying in – work. In the design of the Train to Gain programme, this thinking has been applied in framing the service offer to both individuals and employers.

Customer journeys and national programmes

DWP has used customer journeys in its tendering documentation, eg, for Pathways to Work[1], to give guidance to potential contractors on how the programme was expected to work and the volumes of activity relating to different stages and service elements. Their briefing set out setting out hypothetical client situations, eg, in applying for Incapacity Benefit, setting up the claim, attending a Work-Focused Interview with Jobcentre Plus, screening for more intensive support, and subsequent referral to the Pathways provider, action planning and agreement of appropriate support. The model was tailored to the particular needs of the client and combined 'condition management' to help improve job readiness and a support package which could contain, eg, fares for interview, CV preparation, work trials, basic skills, signposting to local partners, providing in-work support for the customer and employer, providing 'better off in work" advice.

DWP also used stages in the customer journey to estimate the likely throughput on the programme, for example, 80% new claimants on benefit at time of Work-Focused Interview; 46% would be referred to the Pathways provider; and 21% would be expected to enter work through Pathways. Evaluation found that the Pathways model increased flows of people off Incapacity Benefit, and raised monthly earnings and the rate of employment amongst IB claimants[2]. With the introduction of the new Employment Support Allowance, DWP have produced a 'customer journey' leaflet for clients[3]. For staff and partners, they provide a detailed breakdown, almost day-by-day, of the path to be followed by claimants. A further instance of the use of customer journeys was in the national Skills Coaching pilot, where stages in the process formed the core of the model and of training and guidance for Skill Coaches[4].

Regional employability frameworks

Customer journeys also feature in regional models for integrating employment services, such as those in the North East and North West . Figure 1 below draws together common elements of these models[5].

Setting out services phases on routes to work in this way can make a difference to how organisations view their roles in the delivery chain. Brent and Stoke on Trent for example, have found this approach to be critical in helping organisations, especially in the voluntary and community sector, understand better the nature of their contribution and scope to play a bigger role, while at the same time reducing competitive behaviours.

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[1] www.dwp.gov.uk/welfarereform/invitation.asp

[2] DWP (2007) The Impact of Pathways to Work www.dwp.gov.uk/asd/asd5/report_abstracts/rr_abstracts/rra_435.asp

[3] www.dwp.gov.uk/esa/pdfs/journey.pdf

[4] www.skillscoachinghandbook.co.uk/index.php. Skills Coaching aims to support individuals by helping them to identify their skills gaps and find the most effective route into employment. The pilots ran to March 2008,
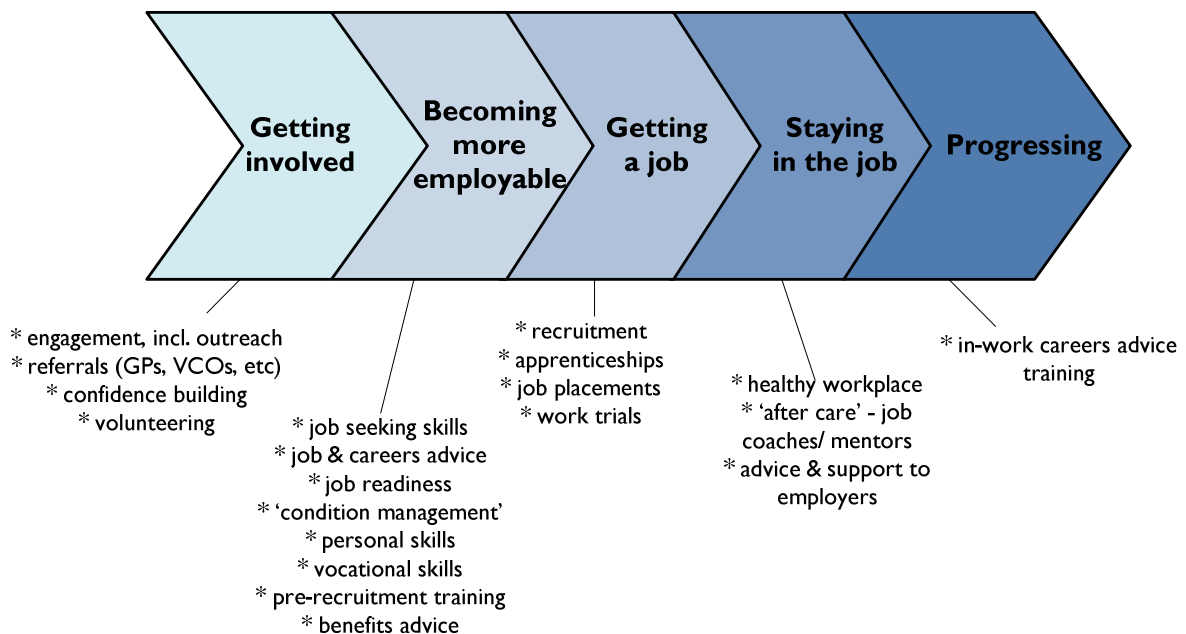
[5] The precursor for these regional models was the Workforce Plus model introduced in Scotland. www.scotland.gov.uk/Publications/2006/06/12094904/0

In the North East, the regional bodies have reviewed funding streams and mainstream programmes in line with their model, and have concluded that:

- Working Neighbourhoods Fund should be targeted at engagement activity and rewarding providers for referral to mainstream or ESF provision
- the RDA Single Programme funding should be used for job placement and aftercare activities most closely linked to employers
- delivery partner activities should concentrate on engagement, specialised pre- and post employment support services

Figure 1 Employability frameworks: paths to sustainable employment

Getting involved

Becoming more employable

Getting a job

Staying in the job

Progressing

* engagement, incl. outreach
* referrals (GPs, VCOs, etc)
* confidence building
* volunteering

* job seeking skills
* job & careers advice
* job readiness
* 'condition management'
* personal skills
* vocational skills
* pre-recruitment training
* benefits advice

* recruitment
* apprenticeships
* job placements
* work trials

* healthy workplace
* 'after care' - job coaches/ mentors
* advice & support to employers

* in-work careers advice training

This staged thinking is influencing emerging practice in the West Midlands. The *North Staffordshire Regeneration Partnership* has adopted such a model[6], with the specific inclusion of 'personal and family support' recognised as a 'pre- pre-recruitment' stage.

Coventry have made use of Local Enterprise Growth Initiative (LEGI) funding to provide an holistic service based on client need, involving outreach, tailored support, job brokerage and post-recruitment assistance. Efforts are made to ensure that clients are not faced with options determined by funder requirements – whether it be Jobcentre Plus, Deprived Areas Fund, LEGI, etc. Front-line staff are expected to identify the most appropriate steps for the client, irrespective of who funds that part of the service. Coventry have also sought ways of strengthening integrated, multi-agency approaches for specific client groups (eg, ex-offenders). This has led to joint working between probation, housing and employment services and to joint commissioning. ESF-funded provision ensures a single assessment by

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[6] www.stoke.gov.uk/ccm/cms-service/download/asset/?asset_id=1649066

a single provider and a number of specialist strands are delivered by sub-contractors geared to requirements on the client journey. Specific caseload intelligence is maintained and efforts made to ensure that clients are not 'lost' to the system. In the context of LAA delivery planning, Coventry are also looking at on- and off-flows and time on benefit, in order to understand potential duplication and unmet needs. A further angle is to explore further the links across LAA targets, especially on housing and health.

Customer journey thinking is implicit in the framework of the Integrated Employment and Skills pilot in the West Midlands launched in October 2008 by the LSC and Jobcentre Plus (Figure 2), in particular the second row, 'Service Offer to Individuals'.

Figure 2 Integrated Employment and Skills Pilot – West Midlands
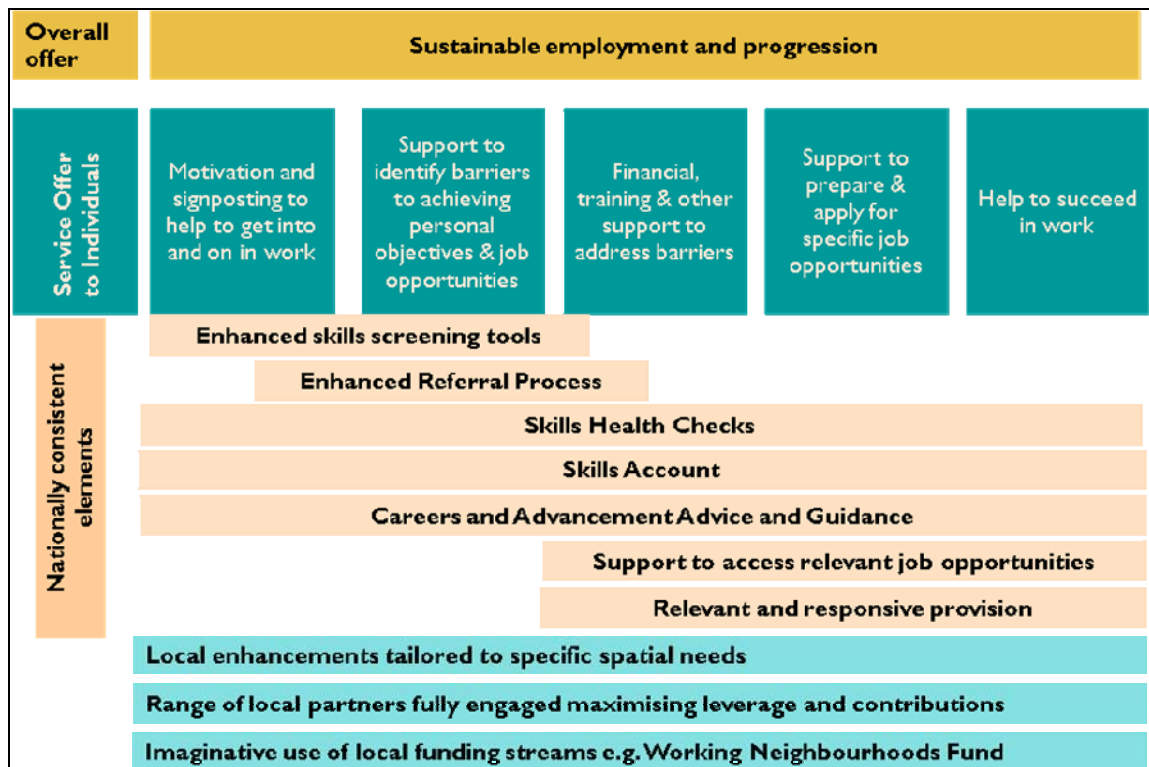
In the East Midlands, the engagement of the client in the process is more obvious in the way the JobMAETs (Multi-Agency Employment Teams) model is set out below (Figure 3). The development of JobMAETs has been given priority in the East Midlands under the regional ESF programme, with support for outreach workers working in appropriate local centres, focusing on the most disadvantaged and excluded customers and communities. Capacity building to support this provision - funded by *emda* – involves local events to build virtual teams and facilitate networking; job shadowing (VCS advisers paired with JCP advisers and others); study visits; and local workshops to build shared knowledge of what each other does (including health services, social services, community services, etc).

Figure 3 **JobMAETs flow chart**

JobMAETs – Customer Journey
Working towards sustainable employment
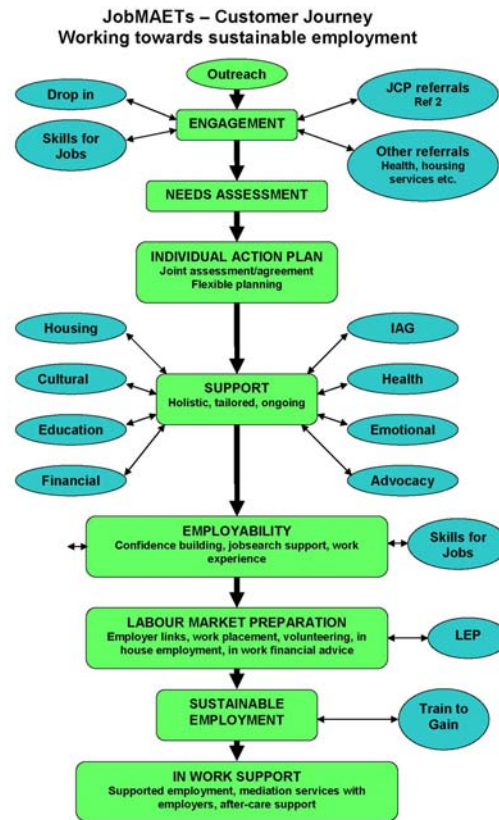
Customer journey mapping

The Cabinet Office has promoted customer journey mapping as an important method for service improvement, highlighting possible uses, eg, to paths experienced by individuals and families (eg, having a new child, leaving education or retiring) and by businesses (eg, starting a business or employing someone). Customer journey mapping has been used in the 'In and Out of Work' pilots where DWP worked with Jobcentre Plus, HMRC and local authorities to make it easier for people to move from benefits into work, requiring them to make only one call to update their details and ensure that they receive the right in-work entitlements. Times to process new claims have also been reduced significantly, redressing what was recognised by DWP as a case of *"very poor customer service"*. The national roll-out of this programme has recently been announced[7], including the West Midlands from January 2008.

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[7] www.dwp.gov.uk/mediacentre/pressreleases/2008/oct/pens106-201008.asp

The Cabinet Office guidance presents three types of journey mapping: customer experience; mapping the system; and measuring the experience – ideally to be used in combination:

- **Customer experience**
  This is most effective for bringing the customer to life and in engaging staff. Key ideas relate to identifying 'touch points' where people come in contact with the services concerned, and 'moments of truth', when they may pause to evaluate the experience and/ or take an important decision. 'Customer emotion' maps may be used, showing how pleased - or otherwise – users are with different stages in their experience of service delivery. Such analysis can paint a very different picture from customer satisfaction data gathered routinely.

- **Mapping the system**
  This is most helpful in mapping across departments and partners, in clarifying where things go wrong, and in setting standards. The main technique is process mapping: identify key steps and decision points (from customer and provider perspectives); clarify who is involved and the interdependencies between individuals, teams and organisations involved in delivery; draw out critical steps or events and diagnose what lies behind problems identified

- **Measuring the experience**
  This is key to identifying what matters most, and understanding what really contributes to successful outcomes: essentially researching baselines and improving tracking of customer progress, satisfaction and outcomes.

The potential significance of customer journey mapping lies in starting with the individual, not the provider. What may seem neat and systematic from a Jobcentre Plus or local authority perspective may not be very integrated to a jobseeker: the service may not be genuinely seamless and it may prove easy to 'fall between stools' in moving between services.

Customer journeys and data sharing

Work in a partnership setting to map the system and measure customer experience – and outcomes – is likely to highlight issues around data sharing. This has been a fraught topic in recent years, especially regarding access to DWP client data. DWP have a policy which permits data sharing provided that the individual client gives consent[8] – and this is increasingly being built into programme delivery, such as the Integrated Employment and Skills pilot. In Coventry, a web-based client management system has been introduced across eight agencies.

Analysis of 'Circles of Need'[9], a new technique which has been developed by Chorley Council with national support, may help local authority services and partner organisations look at the needs of individuals and families in the round, identifying clusters of needs and services which may or may not be well integrated from a customer perspective – and which may considered when looking at different

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[8] www.communities.gov.uk/documents/localgovernment/pdf/143675.pdf

[9] www.chorley.gov.uk/circlesofneed

points on a customer journey. Data sharing is likely to be a key requirement to ensuring seamless services in a multi-agency setting.

Benefits of looking at customer journeys

Researching and thinking through customer journeys has brought benefits for partners both strategically and operationally, eg, in:

strategic benefits

- highlighting any imbalances in resources devoted to different aspects of customer needs (eg, in mainstream worklessness services there has been comparatively little priority to outreach and to in-work support)
- understanding service delivery chains and clarifying the contributions of different organisations to meeting customer needs in the round, not just how 'needs' may be defined by public bodies
- identifying gaps in knowledge about the needs and experiences of particular client groups, including those where take-up may be low
- reducing unnecessary competition between providers and focusing on problem solving rather than blame where the system falls down
- improving specification of targets and standards at different stages in the delivery chain

operational benefits

- developing a better understanding of customer experiences, obstacles and loopholes in the system
- helping to determine what's critical to service quality at different stages in delivery
- aiding overall improvements in service quality and achievement of efficiency gains

Implications for LAA planning and delivery

- Consideration of customer journeys can be key to improvement, whether applied in looking at service design or in deeper analysis of customer experiences.
- Not only can this drive improvements in service quality from the customer's perspective, it can also unblock barriers to more effective partnership working, and lead to more efficient and effective use of resources.
- Improved understanding of customer journeys can be developed as part of structured research and consultation exercises, through improved use – and sharing - of customer intelligence, and by drawing on national research.
- Evidence from work on customer journeys can be used as evidence for Comprehensive Area Assessment, in demonstrating customer focus. Active user involvement in service design and review also show the Best Value Duty to Involve in practice.

Evaluations need to include customer perspectives and consider how individual projects or services sit in the wider delivery system and contribute – or not – to clients making progress towards sustainable employment and related personal goals. There are also implications in adopting research methods appropriate to working with excluded groups.

Resources

Customer insight & customer journeys

Citizen and Customer Insight Guidance (LGA & IDeA) www.idea.gov.uk/caa

Customer Journey Mapping: An Introduction (Cabinet Office)

www.cabinetoffice.gov.uk/public_service_reform/delivery_council/workplan.aspx

Customer journey mapping - Cabinet Office page

www.cabinetoffice.gov.uk/public_service_reform/delivery_council/cjm.aspx

> - online training modules can be accessed via
>
> www.cabinetoffice.gov.uk/public_service_reform/delivery_council/workplan.aspx

Promoting Customer Satisfaction: Guidance on improving the customer experience in public services

www.cse.cabinetoffice.gov.uk/getDynamicContentAreaSectionResource.do?id=81

Delivering public services: service users' experiences of the third sector - National Consumer Council

(2007) www.ncc.org.uk/nccpdf/poldocs/NCC162pd_delivering_public_services.pdf

Putting the Customer First: lessons from business (RSe Consulting for LGA, 2006)

www.lga.gov.uk/lga/publications/publication-display.do?id=21933

Improvement and Efficiency West Midlands project on Customer Intelligence, CAA and performance

management www.wmcoe.gov.uk/index.php?page=374

Data sharing

CLG (2005) Data Sharing for Neighbourhood Renewal

www.communities.gov.uk/publications/corporate/datasharing

CLG (2008) Research on the Costs and Benefits of Personal Data Sharing at Local Partnership Level

(+ case study appendices) www.communities.gov.uk/publications/communities/personaldatasharing

DWP (2006) Data Sharing: An Explanatory Note for Local Authorities, Government Offices &

Jobcentre Plus www.communities.gov.uk/documents/localgovernment/pdf/143675.pdf

HM Government Information Sharing Guidance (2008)

www.everychildmatters.gov.uk/resources-and-practice/IG00340/

Process mapping

Data Unit Wales (2004) Business process mapping

www.unedddatacymru.gov.uk/Publication.asp?id=SXFCBB-A77F7309

NHS Institute for Innovation and Improvement (2005) Process mapping, analysis and redesign

www.institute.nhs.uk/option,com_joomcart/Itemid,26/main_page,document_product_info/products_id,295.html

User involvement

Service User Involvement project: reports, case studies, etc – funded by EQUAL Scotland

www.serviceuser.org/

> Empowerment, Employability And Service User Involvement: Literature review
>
> www.serviceuser.org/show.php?contentid=55
>
> Short briefing from the Scottish Centre for Regeneration:
>
> www.scr.communitiesscotland.gov.uk/stellent/groups/public/documents/webpages/scrcs_021129.pdf
>
> Range of relevant reports from Glasgow Works (the City Strategy Pathfinder)
>
> www.easglasgow.com/researchandpolicy/literaturereview.html

Worklessness-related research

LSC (2007) Evaluation of Year 2 of the Skills Coaching Trials (includes content on the Skills Coaching customer journey) http://readingroom.lsc.gov.uk/lsc/National/nat-skillscoaching-dec07.pdf

DWP (2008) In and Out of Work pilot evaluation: Findings from staff and customer research
www.dwp.gov.uk/asd/asd5/report_abstracts/rr_abstracts/rra_508.asp

DWP (2008) Routes onto Incapacity Benefit: Findings from a follow-up survey of recent claimants
www.dwp.gov.uk/asd/asd5/report_abstracts/rr_abstracts/rra_516.asp

DWP (2008) A 'User Voice' study: Jobcentre Plus customers' perspective on DWP/DIUS strategy for skills (see chapter 5 "Differences across Customer types")
www.dwp.gov.uk/asd/asd5/report_abstracts/rr_abstracts/rra_519.asp

DWP (2007) What Works for Whom?www.dwp.gov.uk/asd/asd5/rports2007-2008/rrep407.pdf

JRF reports (2008) on the theme of 'What is needed to end child poverty in 2020?'
www.jrf.org.uk/knowledge/findings/socialpolicy/2275.asp

> Reports which bring out critical dimensions relating to people in poverty as customers of services include 'Can work eradicate child poverty?' and 'Tackling child poverty when parents cannot work'

JRF (2008) Delivering benefits, tax credits and employment services: Problems for disadvantaged users and potential solutions www.jrf.org.uk/bookshop/details.asp?publD=964

UK Coalition Against Poverty (2008) Communicating Poverty Report (highlights issues from the perspectives of poor service users) www.tuc.org.uk/extras/communicatingpoverty.pdf