

Service or Disservice?

**An investigation into the impact of Customer Relationship
Management (CRM) on service delivery in the Adult Careers
Service in England**

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Foreword

The report outlines the findings of a study into the impact of Customer Relationship Management (CRM) on the quality of the customer relationship and service provided in a career information and guidance setting. The study took place in one of the 11 Next Step regions in England during the period October 2010 to June 2011.

CRM is a system for joining up services that customers receive, including face-to-face, telephone and web-based delivery. It was first introduced in the private sector but the largest area of growth is now the public sector (Goldenberg, 2008). To date the focus of CRM development in the public sector has largely been on systems integration, call centres and providing routine transactions online (King, 2007). The use of CRM in socio-emotional domains such as careers advice and guidance is less common and relatively new. In 2008 the Department for Innovation, Universities and Skills (DIUS) announced that the then named Adult Advancement and Careers Service for England would utilise CRM to provide 'a seamless and personal service for everyone', bringing together web, telephone, text, email and face-to-face services. CRM was first used by the national telephone helpline and introduced to the face-to-face service (Next Step) in August 2010.

Evaluations of CRM implementation in the private sector raise concerns as to whether it can indeed reduce costs and achieve increased customer satisfaction. Without the right attention given to customers, staff, culture and processes it can prove to be a costly mistake and therefore, given the proposed roll-out of this initiative in the National Careers Service in England (by April 2012), it seemed timely that such a study take place.

30 questionnaires were completed by Next Step Advisers, followed by 5 focus groups. The sample was random and reflected a range of qualifications and length of experience. To move beyond perceptual data and measure the actual impact of CRM, observations of 4 face-to-face interviews took place. The advisers observed were selected for their expertise in managing the CRM and providing a quality service. The rationale for such a sample was to reduce any variables due to lack of

experience or competence - if there was a perceivable impact in interviews where the advisers were regarded as adept at CRM and IAG then any findings should have greater validity. In addition to the face-to-face sessions, 4 telephone interviews were also listened to in order to compare with the findings of the face-to-face observations.

Albeit a small-scale study, the multiple methods used and triangulation of the findings provide insights into both the benefits and challenges of CRM in an IAG setting.

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It is not possible to name those involved as personal details have been removed from the report to ensure anonymity.

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Glossary of Terms

CEIAG – Careers Education, Information and Guidance

CRM – Customer Relationship Management

DIUS - Department for Innovation, Universities and Skills

DCG/ QCG – Diploma in Careers Guidance/ Qualification in Career Guidance

ESD - Electronic Service Delivery

IAG – Information, Advice and Guidance

ICT – Information, Communications Technology

OECD - Organisation for Economic Co-operation and Development

Executive Summary

- The report outlines the findings of a study into the impact of Customer Relationship Management (CRM) on the quality of the customer relationship and service provided in a career information and guidance setting. The study took place in one of the 11 Next Step regions in England during the period October 2010 to June 2011.
- 30 questionnaires were completed by Next Step Advisers, followed by 5 focus groups. To move beyond perceptual data and measure the actual impact of CRM, observations of 4 face-to-face interviews took place. 4 telephone interviews were also listened to in order to compare with the findings of the face-to-face observations. The observations were followed by semi-structured interviews with the advisers.
- The limitations of a small scale study must be acknowledged. The use of multiple research methods and the triangulation of the findings ensure a good level of validity. However, in order to check their transferability, the findings and recommendations would benefit from a case-study comparison with other regions.
- The starting point of the study was a review of the literature on CRM which was largely drawn from the private sector. According to the literature, the potential benefits of CRM include increased customer satisfaction, greater empowerment through self-help resources and a reduction in staff costs. However, CRM initiatives are likely to fail where too much emphasis is placed on technology and insufficient attention paid to the needs of the customer, staff, culture and processes. Many authors, including ardent advocates of CRM, admit that the initial enthusiasm of the 1990's has been replaced with scepticism and disappointment as projects either fall short of expectations or take longer than expected to implement (Langerak and Verhoef, 2003; Peelen, 2005; Bohling et al, 2006; Finnegan and Willcocks, 2007; Sauers, 2008).

Comparing the large expectations regarding CRM with the actual results in companies, a sobering picture, and sometimes one of downright disappointment, emerges

(Finnegan and Willcocks, 2007:3)

- A review of the literature into the use of ICT in CEIAG identified a number of benefits. ICT has the potential to increase access to services, freeing provision from the constraints of time and space (Watts, 2001) and enhancing services by providing forums and a source of distance learning in career management skills (Offer and Sampson, 2008). However, the use of technology in CEIAG has also become a major concern, partly due to the increasing pressure on face-to-face resources (Watts, 2001; Bosley et al, 2005; Barnes and La Gro, 2009; Bimrose et al, 2010). A 2005 literature search (Bosley et al, 2005) cited several government reports that regard ICT as a solution to resolve capacity problems and, in the light of this, expressed concern that policy makers view ICT as a replacement for person-to-person services, believing that a good web-site will be sufficient and require no mediation. According to a second literature review (Barnes and La Gro, 2009) this concern has persisted and, with the increased pressure on public spending, there is a concern that policy makers will assume that ICT solutions are economical and cost-effective, a means of reducing the costs of face-to-face services. This strong policy steer continues despite lack of reliable evidence as to the potential impact and cost savings but also in the face of contrary evidence - customers not only value face-to-face contact to help them make sense of information they have gleaned from the web (Bimrose et al, 2010) but also, even if they are confident using ICT for other purposes, do not necessarily want to use ICT for learning and work enquiries (Hawthorn, 2008).
- The review of literature was followed by the use of questionnaires, focus groups, observations and semi-structured interviews. The methodology was successful in providing in-depth insights into both the perceptions and actual practice of advisers.
- Findings indicate that advisers appreciate the benefits of CRM in providing a joined up service, preventing customers from having to repeat their details every time they work with a new adviser or organisation and enabling advisers to access information easily by having the information stored in one place. There were also positive comments about the benefits to customers of having the action plan typed and printed before they leave.

- The negative comments regarding CRM relate not to the fundamental principle but to the design and implementation. The vast majority of negative comments are concerned the amount of time it takes to complete in real time (with the customer) and the consequent impact on the relationship and quality of service. The majority of advisers spend 20-30 minutes inputting data with a first time customer.
- Advisers work hard to minimise the impact of the CRM by using a number of tactics. Humour is used to maintain engagement, templates of commonly used phrases are uploaded from word documents to save time, and customers are engaged throughout the action planning stage through facilitated discussion. Allowing the CRM to 'time out' after inputting the basic details and not opening it again until the action planning stage also seems to maintain the quality of relationship and service. Despite these tactics the findings suggest that the quality of listening is adversely affected when inputting in both face-to-face and telephone interviews.
- A more complex picture emerges where the demands of the CRM are *combined* with the requirement to complete a CV by the Jobcentre Plus. In these instances time spent inputting can increase beyond the 20-30 minutes, the pressure on advisers is significantly increased and the impact on service more pronounced.
- Advisers experience difficulty during inputting in maintaining eye contact and listening. Active or deep listening becomes more surface as the adviser divides his or her attention between the customer and the computer. As a consequence significant cues are missed. During prolonged periods of inputting, customers appear to become less engaged and more distracted.
- Due to the amount of time spent inputting, there is less time to explore and address issues that may be affecting the customer's ability to move forward, for example, mental health and motivation. Customers may leave with an action plan and CV but without the confidence or motivation to follow it through. There is evidence to suggest that advisers are fully aware of these significant issues but consciously choose not to probe or address them due to having to focus on CRM and Jobcentre Plus requirements.

- Advisers expressed concern over how the CRM was implemented. The system appears to have been designed for use by telephone advisers and for a process whereby front-line staff could input the client's details before referring them to a career coach. It does not appear to have been piloted in a face-to-face context with the particular demands of the Next Step service. There appears to have been minimal consultation and involvement of those who would use the system and, as a result, many advisers feel that the language and structure do not reflect the actual IAG process.
- By April 2012 the National Careers Service in England should be established. It is recommended that any review and further roll-out of CRM should involve practitioners in shaping the design and implementation. Attempts should be made to reduce the time spent data inputting including identifying information that is not absolutely necessary to obtain and record.
- Career guidance organisations in other areas of the UK who are considering CRM may benefit from reflecting on the experience of the Adult Careers Service in England. Practitioners should be involved at the outset in the shaping of a vision that will win the hearts of all those using the system and remain involved throughout an implementation strategy that is flexible and adaptable in the light of feedback and changing circumstances. A longer period should be given for staff to develop the skills required with staff development consisting of more than IT training - advisers need to be enabled to integrate IAG skills and technical competence.
- The report concludes that CRM offers an opportunity to enhance the customer experience but that the design and implementation strategy of CRM in Next Step repeated some of the mistakes documented in other fields. Despite adviser attempts to creatively respond to the demands, the current requirements, combined with the pressures from Jobcentre Plus, have created a challenging situation for advisers to navigate in which compromises are made to both the quality of relationship and service.

1. Introduction

1.1 Terminology used throughout the report

A Glossary of terms is provided but, due to the diverse range of literature, it is important to note some of the differences in terminology used throughout the report. The term *customer* is the preferred term used by the Adult Careers Service but this term is interchangeable with that of *client* as used by some advisers and authors. *Career practitioner*, *adviser*, *coach* and *end user* all refer to the person who will use CRM with customers.

It is also important to define the elements of careers education, information, advice and guidance (CEIAG). Careers Education is part of the education curriculum where groups of individuals are helped to develop career management competencies (OECD, 2004a). The definition of career information, advice and guidance is more contentious. The OECD definition of guidance is as follows:

'Career guidance refers to services and activities intended to assist individuals, of any age, and at any point of their lives, to make educational, training and occupational choices and to manage their careers'
(OECD, 2004b:10)

This broad definition includes face-to-face, group work, telephone and web-based delivery. It also covers information, career counselling, assessment and career education. In contrast, the definitions informing the Adult Careers Service draw a clear distinction between the elements of information, advice and guidance. DES (2003) defines information as the process of informing clients about issues relevant to their development. Such information usually requires some interpretation (converted into intelligence). Advice is concerned with helping clients to undertake that interpretation of information and select the most appropriate option. Guidance is defined as a more in-depth process, concerned with helping clients to understand their own barriers and needs relating to learning and work, to set and review goals, to overcome barriers and produce learning and career action plans related to their needs. This distinction reflects other definitions of information, advice and guidance that regard guidance as exploring beyond the client's

presenting 'wants' to gain a more in-depth understanding of what the client may need;

"Guidance is a process not a product, a means not an end: at its' heart is not meeting people's immediate wants, but helping them to clarify their longer term needs." Watts, A.G. (1999)¹

'Guidance involves an in-depth session or series of sessions between the client and advisor, in which the careers advisor helps the client through the process of making decisions about learning and careers' (Skills Commission 2008).

To ensure a consistent conceptual approach the distinctions, as adopted by the Adult Careers Service, are used throughout the study.

1.2 Aims of the study

The aims of the study were as follows:

- to investigate any impact of CRM on the relationship between the career practitioner and customer;
- to identify how career practitioners may uphold an effective relationship with the customer when using CRM.

1.3 Definitions of Customer Relationship Management (CRM)

Some definitions place CRM as being largely a technological initiative which automates front-line customer service. Customers can have dealings with a number of employees across departments via telephone, internet and face-to-face contact and are immediately recognised by up-to-date customer records which contain not only the customer details but also their transaction history (Metagroep, 2000 cited in Peelen, 2005). This definition is mirrored by Eckerson and Watson (cited in Popovich and Chen, 2003). The majority of texts do not place technology at centre stage but place it alongside people and processes with the focus

¹Watts A.G. (1999) *Reshaping Career Development for the 21st Century*" CRAC/NICEC

primarily being on the customer (Popovich and Chen, 2003; Gartner cited in Peelen, 2005; Goldenberg, 2008).

Customer Relationship Management (CRM) is a business approach that integrates people, processes and technology to maximize relationships with customers.

(Goldenberg, 2008:3)

According to Peelen (2005) the most forward looking definition is one which points to the building of an infrastructure in which 'the walls of customer and company are torn down', where customers and companies have access into each other's domains (McKenna cited in Peelen, 2005).

Customer and company move closer to each other. Each will have to react to and anticipate the other's actions more directly.

(Peelen 2005:5)

1.4 The potential benefits of CRM

The main rationale for CRM is to increase customer satisfaction (Popovich and Chen, 2003; Peelen, 2005; Bohling et al, 2006; Finnegan and Willcocks, 2007; Goldenberg, 2008; Matthews, 2008) and also increase efficiencies in customer support (Finnegan and Willcocks, 2007; Goldenberg, 2008). A company can build a customer profile and track interactions so that interventions can be tailored and 'joined up'. Customers will no longer have to repeat their case history every time they engage with the company. Furthermore it responds to an increasing demand by customers for self-service resources. This not only reduces staff costs (Goldenberg, 2008) but leads to greater empowerment as customers can access resources that meet their needs in their own preferred place and time (Popovich and Chen, 2003; Peelen, 2005; Bohlen et al, 2006; Finnegan and Willcocks, 2007; Goldenberg, 2008).

CRM lets customers conduct business with a company the way the customer wants

(Goldenberg 2008:71)

1.5 Evaluations of CRM in other fields

Despite the apparent agreement of potential benefits, cautionary voices are concerned with how these objectives may not be realised in reality. Many authors, including ardent advocates of CRM, admit that the initial enthusiasm of the 1990's has been replaced with scepticism and disappointment as projects either fall short of expectations or take longer than expected to implement (Langerak and Verhoef, 2003; Peelen, 2005; Bohling et al, 2006; Finnegan and Willcocks, 2007; Sauers, 2008). Studies into success rates vary in their findings: some authors cite successful implementation of CRM being as low as 30% (Hoekstra, 2001 cited in Peelen, 2005; Tafti, 2002 cited in Finnegan and Willcocks, 2007). Other authors placing success at 50% (Robinson, 2000; Fox, 2001 cited in Sauers 2008) and one study capturing this range as being somewhere between 30 - 70% (Langerak and Verhoef, 2003).

Comparing the large expectations regarding CRM with the actual results in companies, a sobering picture, and sometimes one of downright disappointment, emerges

(Finnegan and Willcocks, 2007:3)

The greatest reason for failure is largely due to placing too much emphasis on technology and insufficient attention to three other factors; the needs of the customer, the people within the company who will use the system and the services and processes provided (Guyaux cited in Fung, 2001; Keenan, 2001; Popovich and Chen, 2003; Peelen, 2005; Finnegan and Willcocks, 2007; Goldenberg, 2008; Sauers, 2008; Svensson and Wood, 2008). What follows is a greater consideration of these three areas.

1.6 Focusing on the customer

Taking the first of these aspects, the term *customer intimacy* is used by a number of authors to emphasise the need to truly understand and respond to the customer's needs (Goldenberg, 2008; Langerak and Verhoef, 2008; Sauers,

2008). The term was originated by Treacey and Wiersman (1995) as one of three disciplines alongside operational excellence and innovation that characterise market leadership. The authors argue that, whilst CRM may be regarded as innovative, it may also undermine customer intimacy. According to Sauers (2008), CRM systems will fail if companies do not develop 'intrapersonal and interpersonal trustworthy relationships' with customers. Sauers (2008) argues that traditional CRM software fails to address the emotional-relational processes and that designers need to understand the stages of building and maintaining an emotional relationship;

The problem lies in disregarding and misunderstanding the fundamental emotional nature of human relationship development

(Sauers 2008:5).

Likewise, Matthews (2008) argues that many CRM systems are designed to reflect the needs of the organisation rather than that of the customer. He argues that customers do not want to be managed but to receive a service in which their needs come before that of the organisation, that the emphasis on record management can lead to people feeling 'processed' rather than treated as individuals. He points to statistics that show declining customer satisfaction rates to support this point. Goldenberg (2008) also warns that customers can feel dehumanised by the process and dissatisfied if alternative systems are not provided when the self-service system isn't working.

1.7 Winning the hearts and minds of CRM users

The second dimension for successful implementation is paying consideration to the potential CRM users (employees). Many managers reduce end user issues to limiting resistance, providing training and having the right staff available (Finnegan and Willcocks, 2007). However, end users are the building blocks of customer relationships (Popovich and Chen, 2009) and need to believe in the goals of the company and the potential of the CRM to enable them to do their job (Svensson

and Wood, 2008). Managers need to create a felt need for the CRM, a sense of ownership (Finnegan and Willcocks, 2007). Likewise Sauers (2008) argues that organisations need to consider the emotional-relational needs of their employees, and Peelen (2005) argues that they need to delegate decision making to those people in the organisation who are closest to the customer;

Alongside securing staff commitment there also needs to be clarity regarding the function of CRM, in particular, differentiating between those functions which are essential and those which would be 'nice to have'. Otherwise users of the system can become overwhelmed or confused (Goldenberg, 2008).

1.8 Attending to services and processes

The third element for successful implementation is to pay sufficient attention to the services and processes involved. Implementation can actually be very costly (Goldenberg, 2008), analogous to pouring money down a black hole if the organisational culture is not sufficiently customer-orientated (Dickie, 1999 cited in Popovich and Chen, 2003). For many companies, successful implementation requires a complete paradigm shift in order to create an organisation that is truly customer-centric. Culture, structures and procedures will need to be redesigned or adjusted starting from the customer perspective (Popovich and Chen, 2003; Peelen, 2005; Finnegan and Willcocks, 2007; Goldenberg, 2008) and for every dollar spent on technology, a company should expect to spend \$1.50 on training (Goldenberg, 2008). However, many companies fail to achieve this sub-cultural integration – departments continue to distrust each other, tacit and non-codified knowledge is hoarded rather than shared and the objective of providing a 'joined up service' for customers falls short (Finnegan and Willcocks, 2007).

Therefore the current position on CRM is that it is 'neither a resounding success nor a dismal failure' (Bohling et al, 2006:192). It can promise enhanced customer service and a reduction of costs but can also prove to be a costly mistake if insufficient attention is paid to customers, staff, culture and processes;

CRM applications don't replace business processes or fix an ineffective process; they also don't create or maintain relationships or produce a product or service. In fact automating an ineffective process can be costly and lead to a CRM system not working

(Goldenberg 2008: 93)

1.9 Information and Communications Technology (ICT) in CEIAG

In recent years there have been significant advances in the use of ICT in CEIAG, moving from Web 1.0 technology which facilitates the storage and retrieval of information to Web 2.0 and 3.0 which provide a forum for dialogue, greater interactivity and client generated material (Barnes and La Gro, 2009; Bimrose et al, 2010; Hooley et al, 2010). ICT in CEIAG is regarded as having the potential to increase access to services, freeing provision from the constraints of time and space (Watts, 2001) and enhancing services by providing forums and a source of distance learning in career management skills (Offer and Sampson, 2008). Whilst the advantages of ICT are acknowledged, the use of technology in CEIAG has also become a major concern. This is partly due to the rapid growth of technology used by young people and the need to respond to their needs, but also because of the increasing pressure on face-to-face resources (Watts, 2001; Bosley et al, 2005; Barnes and La Gro, 2009; Bimrose et al, 2010). A 2005 literature search (Bosley et al) cited several government reports that regarded ICT as a solution to resolve capacity problems and, in the light of this, expressed concern that policy makers regard ICT as a replacement for person-to-person services, that a good web-site will be sufficient and require no mediation. According to a second literature review (Barnes and La Gro, 2009) this concern has persisted and, with the increased pressure on public spending, there is a danger that policy makers will assume that ICT solutions are a means of reducing the costs of face-to-face services. This strong policy steer continues despite lack of reliable evidence as to the potential impact and cost savings but also in the face of contrary evidence - clients not only value face-to-face contact to help them make sense of information they have gleaned from the web (Bimrose et al, 2010) but also do not necessarily want to use

ICT for learning and work enquiries, even if they are confident using ICT for other purposes (Hawthorn, 2008).

The increased use of ICT raises the question of practitioner competence and the need for skills development (Cobbett et al, 2009; BIS, 2010; Bimrose and Barnes, 2010; Department for Education, 2010). Practitioners not only need an IT proficiency equal to that of their clients in order to maintain respect but also the ability to manage ICT in real time (Bimrose et al, 2010). According to Green and Hannon (2007, cited in Bimrose et al, 2010), practitioners require skills such as parallel processing, multi tasking, problem solving, trial and error learning, hand-eye co-ordination and technical confidence. An investigation into the skills needed by advisers working with young people identified the need for technical skills but also an ability to transfer their interpersonal skills to other mediums, for example, managing the intensity of silences over the telephone and demonstrating empathy when using email (Bimrose et al, 2010).

The literature search on ICT in CEIAG acknowledges the potential of ICT to improve current provision if it is part of a blended service, integrating ICT with person-to-person delivery. However there is a concern that ICT may be used to replace or reduce a personal service and lower the quality of service. This policy is becoming a stark reality in CEIAG services for young people in England with extensive cuts to face-to-face provision:

Providing pupils with access to on-line and telephone advice lines will be sufficient to meet the statutory duties, according to Government guidance.

(Institute of Career Guidance 2011:4)

1.10 The relationship between the career practitioner and customer

An assumption underpinning the study is that the person-to-person relationship between career practitioner and customer is an important feature of the CEIAG process, an assumption that is supported by literature drawn from the CEIAG field

(Cochran, 1997; Watts, 2001; Reid and Fielding, 2007; Bimrose et al, 2010). Watts clarifies why the relationship is critical to the customer's career development:

The rationale for the relationship model is that career decisions have an important cognitive component, but that they are bound up very closely with people's feelings about themselves, their sense of identity, and their dreams and aspirations. Accordingly the individual can best be helped by working in a relationship with another individual who has the skills to enable them to address their distinctive identity.

(Watts, 2001:9)

Watts argues that ICT may only be regarded as a threat to the relationship model if the nature of that relationship is held frozen in time, that there is the opportunity for technology to develop and sustain relationships albeit in different ways. Therefore the relationship does not have to take place face-to-face but *person-to-person* via other media such as telephone, internet 'chat' and videophone. According to Watts effective service delivery interweaves human and technical resources. However, whilst this may be a desirable aim, poor design and implementation may undermine this vision. The review of literature on CRM identified that many authors regard failure as a result of not understanding or taking into account the need for a more meaningful and emotional relationship (Peelen, 2005; Goldenberg, 2008; Langerak and Verhoef, 2008; Sauers, 2008).

An effective relationship is often demonstrated by the adviser's capacity to listen effectively to the customer. There are many models outlining hierarchies of listening, for example Bresser and Wilson (2006), O' Connor and Lages (2004), Parsloe and Leedham (2009), Somers (2006), Starr (2003), Whitworth *et al* (1998). The hierarchy used in the research study is that of Starr (2003). According to Starr, level one is *cosmetic*, where the practitioner is preoccupied with other matters and pretending to listen; level 2 is *conversational* which requires little effort and reflects day-to-day 'chat'; level 3 is *active*, requiring effort to stay focused, asking questions to understand further, mentally registering and processing what has been said and demonstrating listening through reflecting back; level four is *deep* listening, 'experiencing the other person with a sense of who they are, as well as what they are saying' (Starr, 2003;136).

1.11 Summary of literature review

According to the literature on CRM, the potential benefits include increasing customer satisfaction, greater empowerment through self-help resources and a reduction in staff costs. However, CRM initiatives are likely to fail where too much emphasis is placed on technology and insufficient attention paid to the needs of the customer, staff, culture and processes. In the field of CEIAG there does not appear to have been any research into the use of CRM to date although many authors are wary of current government policy that appears to focus on the cost-saving measures without upholding the need for a personal interaction.

2. Methodology

2.1 The customer perspective

Whilst customer reactions and behaviour were an essential part of the observations, their views on the quality of service and relationship were not explored due to the nature of data required. A high percentage of customers are referred by Jobcentre Plus where the time available per customer is often limited to around six minutes. As a result customers can be critical of the Jobcentre Plus service and may suffer from what could be called *comparative* bias, tending to rate as high any degree of listening relative to what they have previously received. Furthermore, customers are also often unaware of what a quality service should consist of, an assumption supported by a comment made by an adviser in one of the interviews:

When we challenge them they only put 'fairly happy' but when you give them what they want, even if it's unrealistic, they say they're really happy with the service.

(Adviser A)

If the customer perspective were to be meaningfully sought then considerable preparatory work would have to take place in order to ensure that the customer understood what was being measured, that is, the nature of a quality service and an effective relationship. In doing so they could offer an *informed* opinion.

2.2 Ethical considerations

All participants, advisers and customers, were informed of the nature of the study and written consent gained. Names have been removed throughout the report in order to respect confidentiality and retain anonymity.

2.3 The sample

The study took place at an early stage of implementation when, in terms of organisational change, resistance may be high as people grapple with their confidence and competence. Therefore, whilst the sample for the questionnaires and focus groups were random, the sample of advisers for the observations and semi-structured interviews consisted of advisers who were identified by their managers as:

- a) not resistant to CRM
- b) having adopted a pragmatic approach and integrated CRM effectively into their practice
- c) were qualified to at least NVQ4 and with over two years experience

It was hoped that this sample of advisers would yield data that:

- a) identified good practice in managing the CRM
- b) was likely to have a high level of validity i.e. the findings not being distorted by a negative attitude towards CRM, lack of expertise in creating an effective relationship or inadequate IT skills.

2.4 Research methods

In addition to the literature review, multiple methods were used to gather multiple perspectives and provide the opportunity for triangulation, therefore increasing the validity of the findings.

Questionnaires were issued face-to-face to ensure a high return rate and to allow respondents to clarify any questions they were unsure of. In total 30 questionnaires were completed out of a total of approximately 300 staff which amounted to a sample size of 10%. In each group there was a spread of qualification level and length of experience. The questionnaire (appendix I) was designed to gather

quantitative data on the adviser level of qualification, experience, typing speed and the time spent data inputting. It also gathered qualitative data regarding adviser attitudes towards CRM and perceived positive and negative effects.

The questionnaire was followed by 5 focus groups of 6-7 people which aimed to explore adviser perceptions as to the challenges of CRM and allied potential solutions.

Observations of practice were used to move beyond the advisers' perceptions of what they do to reveal their actual behaviour in an IAG session. Four face-to-face sessions were observed in their natural setting (Next Step offices). To reduce observer bias an observation schedule was used (appendices II and III), the sessions were audio recorded and transcribed and a second opinion sought on the analysis.

Three telephone sessions were also recorded and listened to although not observed in person as it was not feasible to watch the customer response.

The face-to-face observations were immediately followed by semi-structured interviews. The questions were very few and open (appendix VIII), designed to encourage the interviewees to share their interpretation of the event and their thoughts on the impact of CRM and how it could be managed. To avoid problems with recall, the interviews were audio taped.

2.5 Approach to the analysis

The questionnaires were manually analysed with answers compiled onto one sheet, scanned for themes and then grouped according to categories such as adviser qualifications, length of experience and IT capability. The same method was used for collating and analysing the responses of the focus groups.

A thematic approach was used to analyse the observations and interviews, scanning the transcripts to identify any patterns, commonalities and differences. A second perspective was sought to check the validity of analysis.

2.6 Limitations of the study

This study took place in one of 11 regions and at a particular point of their experience of CRM implementation (4 to 8 months after the launch). Therefore any attempt to form generalisations would need to be tentative. Practitioners worked for a variety of companies across the region and a range of research methods was used to triangulate the findings. However the sample size was small and the extent of generalisability would need to be further tested by comparing the case-studies with cases from other regions.

3. Findings and analysis

3.1 Adviser attitudes towards CRM

The questionnaire asked respondents to rate using a scale of one to ten, with ten being positive and 1 negative, the impact they thought CRM had on the service customers receive. The responses (Figure 3.1) indicate that there is a slight leaning towards regarding CRM as having a more positive than negative impact.

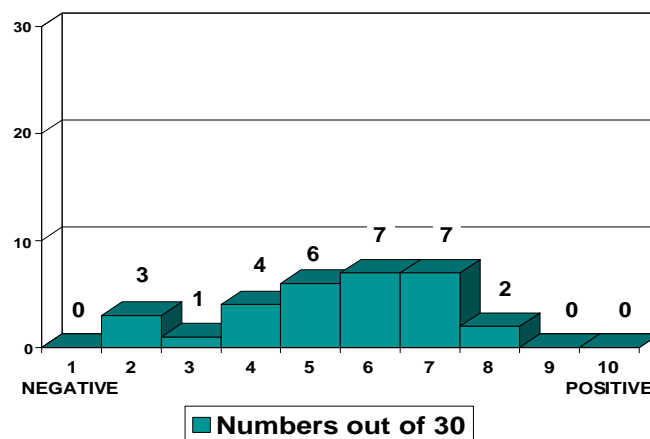


Figure 3.1 Perceived impact of CRM on the service customers receive

3.2 Perceived positive and negative effects of CRM

Respondents were then asked to identify the positive and negative effects of CRM. The responses to this question throw light on what informed their response to the scaling question. From scanning the responses a number of categories emerged (appendix VIII). CRM was regarded as creating a *joined-up-service* for the customer and adviser (21 comments) and leading to *improvements in action planning* (13 comments), *administration* (13 comments) and the *IAG process* (3 comments). These comments reflect the original aims of CRM, namely to increase customer satisfaction, provide a seamless service and improve processes.

The negative comments were likewise categorised into themes. By far the largest number of negative comments referred to how *time consuming* the process of

inputting data was and the consequent effect on *the relationship with the customer and the IAG process* (23 comments). The core conditions of the relationship seem to be under strain - advisers felt that the time spent looking at the screen led to customers not receiving their full attention or feeling listened to. They also thought that the time used for inputting could have been more usefully spent, that it was difficult to maintain eye contact, that there were awkward silences and the service was adversely affected. The next largest category of negative comments related to *technical difficulties* such as not being able to use the system in real time when working off site or with groups, the system crashing and the consequent impact on the customer and adviser (20 comments). The third negative area of impact is the *software design*, which impacts on both the customer (8 comments) and adviser (4 comments).

The findings of the focus groups (appendix VI) were categorised using the same process as the questionnaires. Following this, a triangulation exercise took place with the data from the questionnaires on the 'negative effects' of CRM with the data from the focus groups on the 'problems' of CRM. A three column approach was used, identifying responses exclusive to the questionnaires, responses exclusive to the focus groups and responses in common (appendix VII). From this exercise it is immediately apparent that the vast majority of comments are replicated by both sets of respondents and methods. The only significant difference in the results is that the focus groups provided additional insights into the problems with the design and implementation of the system. Comments referred to the inflexibility of the system, the adviser not being able to revise action points in subsequent sessions so that the document made sense to clients, and the lack of apparent piloting in a Next Step context.

3.3 Length of time spent inputting data

In terms of frequency of comments from both the questionnaires and focus groups, the main challenge appeared to be the length of time spent inputting data. The questionnaire asked respondents to identify how long they spend inputting with a

first customer and with a return appointment (the length of appointment is usually 45 minutes to 1 hour for a first appointment).

The data revealed that for first appointments, 36.7% of respondents took between 10 and 20 minutes and 33.3% between 20 and thirty minutes. Quite a significant number (23.3%) took 30-45 minutes (Figure 3.3). This time was significantly reduced if the customer came back for a second appointment. Gaps in the numbers relating to the second appointment are due to the fact that, being new to the role, 13.3% hadn't as yet conducted a second appointment

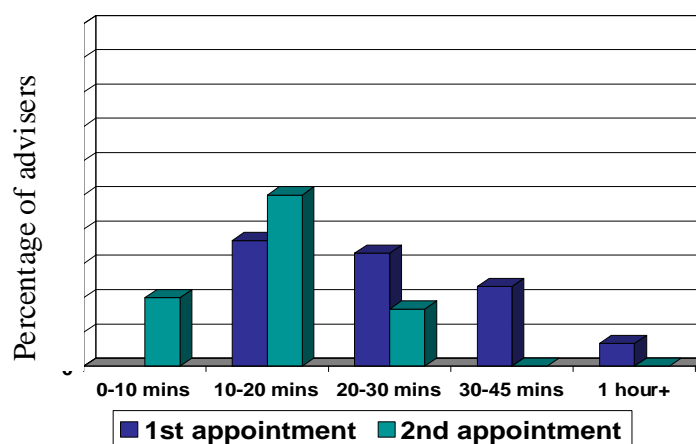


Figure 3.3.1 Length of time spent inputting data – first and second appointment.

The time spent inputting data on a first appointment was examined in terms of advisers' length of experience, qualifications and typing speed (appendix VIII). There were no significant conclusions that could be drawn, for example, advisers whose typing speed was classed as 'excellent' took either 10-20 minutes or 20-30 minutes, much in line with the general pattern.

What is difficult to understand from the questionnaire responses is what the respondents meant by these figures, for example, did they mean they were intermittently breaking away to talk to the customer? Was this pure inputting data without dialogue? The findings of the observations and semi-structured interviews are critical for providing further insights into the meaning of this data.

The observation notes of the four face-to-face sessions were analysed side by side to identify any themes or patterns (appendix IX). The length of time spent inputting data (facing the screen) varied from 20 to 35 minutes although the higher figure represents a session which focused on typing a CV in addition to using CRM. If typing for other purposes is removed from the equation, then inputting data for CRM alone (customer details and action planning) took between 20 and 36 minutes with three out of four advisers taking between 20 and 25 minutes. There was also a considerable degree of interaction taking place with typing broken with intermittent eye contact. In the interviews that followed, all four advisers said that inputting data took longer when trying to maintain an effective relationship at the same time.

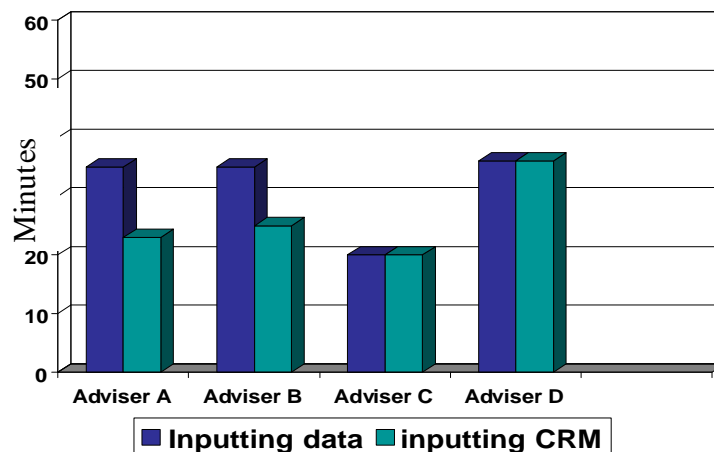


Figure 3.3.2 Length of time spent inputting data in face-to-face observations

3.4 The quality of relationship

In three out of the four interviews the general level of rapport was 'very good' to 'excellent' with the fourth being 'good' (in this interview the customer appeared to have a hangover and achieving a higher level of interaction would have been difficult). There was evidence of active listening in all four interviews, with advisers accurately reflecting back what had been said. The customers appeared to be generally responsive and appreciative, as indicated by their own use of humour and their comments on the helpfulness of the session.

Therefore what emerged from the observations was that advisers were generally adept at multi-tasking, typing whilst talking, and using tactics such as humour to maintain an effective relationship.

I have to use humour as it's such a dry process – you've got to stop them from getting bored.

(Adviser A)

However, what also emerged was that the level of listening was significantly better when not typing, that there were occasions when the quality of listening deteriorated and the relationship was adversely affected. In the face-to-face sessions this was particularly evident during action planning. The action planning stage took between 15-24 minutes and for three of the advisers contained a number of silences lasting between 20 and 30 seconds. During this time two customers stared into space, one looked at his watch surreptitiously and sighed twice. One customer, in addition to staring into space put his head in his hands, stopped joking and gave more minimal responses. These signals were either not picked up or there was a delay in doing so. Only one of the advisers, the one who used CRM the least in the session, managed to maintain active listening and the customer's interest throughout the whole interview. He was also the only adviser to display deep listening, the ability to pick up on cues and what was unsaid, for example:

You smile more obviously when you talk about Spain

There's a lot of conflict going on, is there something deeper about going to University? Is there a fear of failure?

(Adviser C)

Two of the four advisers did not pick up on significant issues that were impacting on the customer's ability to engage in a job search, namely mental health and alcoholism combined with loss of driving licence. The post-observational interviews served to throw light on the reason for this. Both advisers said that they were aware of the issues but consciously chose not to explore further because they did not have the time, that the requirements of CRM *combined* with those of the Jobcentre Plus to produce a CV, meant that they only had time to deal with presenting issues.

It's both the CRM and the pressure of targets that has an effect. I knew I wasn't looking at him enough

(Adviser D).

It is interesting to note that out of the two advisers who did probe deeper, one tried to meet the requirements of a CV and ask probing questions but his interview took 90 minutes (half an hour over the scheduled appointment time). Therefore, only one adviser out of three managed to meet the requirements of CRM and explore significant issues close to the allocated appointment time. However, this adviser only managed to achieve this because he did not focus on completing a CV but showed the customer how to do it herself outside of the interview setting. It is important to note that this customer was far more capable of writing her own CV than the other three customers in terms of confidence, self awareness and literacy. Hence the adviser was able to make such a choice whereas the other three advisers were under more pressure to ensure a CV was completed.

Three telephone sessions from another organisation were listened to in order to provide another perspective on the impact of CRM. However the analysis is limited due to not being able to observe what took place and lack of follow up interviews. The advisers used the same CRM system but were not Next Step advisers. They appeared to be under less pressure to complete a full action plan in real time although, without observing, it is hard to say when and how this was done and to what quality. The sessions were compared using the same method as the face-to-face observations (appendix X). What can be gathered from the recordings is the impact of CRM on listening, particularly at the start of the session when the advisers gathered the customer's details. Two out of the three advisers initially asked the customer what they wanted, proceeded to ask questions for CRM but had to repeat the initial question as they had forgotten what had been said. On a third attempt one adviser's recall was incorrect, reflecting back that the customer had asked for information when she hadn't. In two out of the three interviews there was too much focus on completing CRM at the start and not responding fully to the customer's presenting issues before doing so (Table 3.4). The data inputting started 30 seconds into the interview with little attempt at the outset to demonstrate listening or build the core conditions required for an effective relationship.

Table 3.4 Excerpt from telephone session

Customer:	I'm interested in a change in my career
Adviser:	okay, have you called us before?
Customer:	never, I've worked in the same job for a long time
Adviser:	okay, well we can certainly have a chat. I need to take some details from you first though if that's alright? (proceeds to ask CRM questions and inputs data)

In contrast, the third adviser delayed completing the CRM and instead spent 2-3 minutes exploring why the customer had called and building the relationship with active listening and positive responses to the request:

Right, well if you've got the time we can talk about that to see if there's any part of the CV or covering letter you want to discuss. We can do that ..

It's always back to you isn't it? You make the decisions but we can maybe talk about things you need to consider that will help you through this. Okay?
(Adviser F)

Although a subtle difference, Adviser F demonstrates more genuine concern for the customer from the outset.

Therefore, the data gathered from the face-to-face observations, telephone sessions and post-observation interviews confirms the comments made by respondents to the questionnaires and focus groups. It suggests that the adviser's capacity to listen *is* likely to be adversely affected by inputting data. However, in the observations and interviews a more complex picture emerges about the demands of the CRM. It appears that advisers have insufficient time to explore significant issues, not solely because of the data required for CRM but because it is combined with a pressure from Jobcentre Plus to complete a CV in order that the customer can continue to claim benefits. As a result, it is not only the relationship that is affected but also the quality of service that the customer receives.

3.5 The quality of Service: Information, Advice and Guidance

All four advisers observed in the face-to-face sessions were qualified to conduct *guidance* interviews, that is, to explore beyond the presenting issues and address longer term needs. Yet three of the four consciously chose to stay with the presenting issues, the realm of *advice and information* (see introduction for definitions of information, advice and guidance).

It's a dilution of the service, giving them what they want and not exploring or challenging.

It's frustrating but we haven't got time to do both. I purposely didn't go there when he talked about his mental health issues. We haven't got time to do advice and guidance

(Adviser A)

I'm wondering whether it has changed the way I interview. I follow the same format and I forget to probe. My old assessor came to observe me and she said 'I can't believe what it's done to you. It's gone. Your style has changed'

(Adviser D)

Whilst these comments reveal the effect on the quality of service, it could be argued that the Next Step service is only funded to provide advice and information. However, like many providers, it is the policy of this region to offer guidance where needed in order to help the client move forward. It is also evident that one of the advisers managed to meet both the demands of CRM and a guidance session, although not the requirements of the Jobcentre Plus to conduct a CV. Therefore, in the current arrangements it appears that something has to suffer, whether that be CRM requirements, the requirements of the Jobcentre Plus, the relationship with the customer or the quality of service. Advisers are placed in a position of having to consciously decide and there is a danger that their sense of job satisfaction will be adversely affected if they no longer believe in the service they are offering. The customer, not knowing any better, may be happy with the service because they have been given what they want (a CV) in order to continue to receive their benefits and have not been challenged in any way. However, it is questionable as to how useful the sessions really are as they may leave with a CV but be unsuccessful in job search because of additional needs which have not been brought to light or addressed.

3.6 Timing of CRM use

The most successful interviews (face-to-face and telephone) in terms of maintaining a quality relationship and service all used the same approach to CRM in terms of timing. They did not use CRM throughout the interview but began with a period of settling the customer in. This was followed by inputting CRM details but in a customer-friendly way (reflecting back and using humour where appropriate to engage). Having inputted the customer's details, the advisers let CRM 'time out' in order to completely focus on the customer. Near the end of the session CRM was logged back into in order to complete the action plan. Table 3.6 reflects a synthesis of the approach used by these advisers.

Table 3.6 Effective timing of CRM use

<p style="text-align: center;"><u>Pre-interview – 5 minutes</u></p> <p>Ask customer to complete paper-based management information form which gathers information needed for CRM</p> <p style="text-align: center;"><u>Establishing the relationship 2-3 minutes</u></p> <p>2-3 minutes settling the customer in, find out why they have come, respond in a positive manner, build the relationship through active listening and reflecting back.</p> <p style="text-align: center;"><u>CRM gathering of basic details 3-5 minutes</u></p> <p>Use information from paper-based MI form. Involve the customer by discussing what information they have given. Stay in neutral territory so that it's easy to listen and type at the same time. Use appropriate humour and reflect back the content of what has been said to demonstrate further listening.</p> <p style="text-align: center;"><u>Exploring the story 30-40 minutes</u></p> <p>Leave CRM to 'time out'. Make minimal notes on paper or a word document. Employ deep listening, ask probing questions and reflect back significant issues</p> <p style="text-align: center;"><u>Action planning 15-20 minutes</u></p> <p>Log back into CRM. Involve customer in summarising and identifying action. Complete Action Plan/ upload word document if used. Personalise any templates used.</p>
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3.7 Reducing time spent inputting: the use of templates

A solution offered by the focus groups to reduce the time spent on the action planning part of CRM was the use of templates, that is, commonly used stock phrases that can be tailored to the customer. Three out of four of the advisers observed used such templates which they had personally created and proceeded to upload from a word document:

I think one of the key things is to develop some templates for the stuff that you say a lot. It becomes less of a barrier then if you've already prepared it.

(Adviser A)

Table 3.7 is a synthesis of some of the templates used by the advisers. It is important to stress that the advisers used these sparingly and ensured that they were personalised for the customer.

Table 3.7 Examples of templates used by advisers

Summary of discussion

- We discussed the value of carrying out an in-depth audit of your skills through completing a Skills Health Check through the Next Step website (www.nextstep.direct.gov.uk) which helps you to look at your skills, strengths and motivation related to work.

- The Next Step service also provides a free telephone helpline where you can talk to advisers about your plans on 0800 100 900. The Next Step website at www.nextstep.gov.uk includes lots of useful information including job profiles, a CV builder and a Skills Health Check which helps you to look at your skills and strengths in more depth

Action points

- Use job profiles from the <https://nextstep.direct.gov.uk> site to identify your current skills in relation to the jobs you are considering
- I will contact you in 1-3 months time to see if you need further help and see how you're progressing. In the meantime if you want to contact me my number is _____
- Through discussion and completion of a pro-forma, a targeted CV and a general CV will be developed for you. I'll e-mail these for you to check and agree.

3.8 Facilitative action planning

In the observations, advisers who used a facilitative rather than directive approach reduced the amount of awkward silences in action planning. A facilitative approach involves asking the customer to summarise the discussion and identify their own action points with the adviser only offering suggestions if necessary. This is not only an empowering approach for the customer but has the added bonus of the adviser being able to type whilst the customer talks.

Advisers who used this facilitative approach asked the customer questions such as 'so what would you say your objective is then at the moment?' (Adviser E) and 'what do you think you feel you're kind of going to do now – your next steps forward?' (Adviser F).

The most striking example of this approach was the method used by Adviser C. He reflected back to the customer her thought patterns and then asked her to imagine that she was giving a friend advice as to what to do (Table 3.8). To increase the effectiveness of the imagination exercise he used an exercise drawn from Gestalt work, asking her to swap chairs with each chair representing a different perspective, for example, she was asked to sit in a chair that represented a friend and to consider the advice she would give herself. The customer appeared to enjoy this activity and generated her own answers. It also created the opportunity for the adviser to type whilst the customer talked. This process maintained the customer's engagement but also challenged her thinking and encouraged learning, moving beyond advice and information into the domain of guidance.

Table 3.8: example of facilitative action planning

Adviser:	Let's imagine that I'm someone else and I've just told you everything you've just told me right?
Customer:	yeah
Adviser:	and the key sentence from the past forty five minutes has just been uttered. When I asked you who would you be worried about if you failed you said 'Oh nobody just my self'
Customer:	yep
Adviser:	right, let's swap chairs (they swap). I'm you. Imagine that you're a friend of yours. You've just heard me say that it's only myself that would give me a hard time. What would you say to that?
Customer:	I'd probably say to you, look how much you've achieved or that you've never failed before, why would you fail? Why, what's stopping you failing?
Adviser:	yes who's gonna care if you fail?
Customer:	who cares, yeah!
Adviser:	so, let's swap back (they get back into their own chairs). Let's get this down. What's your next step? (begins to type)
Customer:	I feel very inspired, I've really enjoyed this session, cos I feel a tickle in my stomach. So I'm meeting my friend after this and I'm gonna tell her what I'm going to do. I'm not gonna put anything into place at the moment until I've got the right information so I'm going to get that prospectus and speak to my husband, start to put those things in place. If I don't take the option of University at least I know that I've given myself the opportunity

3.9 Adviser perspectives on the design and implementation of CRM

Whilst acknowledging the benefits of CRM in general, many advisers were critical of the design and implementation of this particular system. The CRM for Next Step appears to have been designed for use by telephone advisers (the then named Learndirect service) and for a process in which front-line staff could input the customer's details before referring them to a career coach. It does not appear to have been piloted in a face-to-face context with the particular demands of the Next Step service. Advisers therefore feel that the system does not reflect the actual IAG process in terms of language used and structure. They also believe that it tries to serve too many purposes, gathering too much data for statistical reasons that are not relevant to the customer's interests.

The responses to the questionnaires and focus groups provided insights into the main challenges and potential solutions (see appendices V - VII). In particular implementation seemed to be 'top down' with insufficient lead in time:

There wasn't much lead in time – 1 month, 2 days training and you had to be up and running.

(Adviser D)

With such a short lead in time it is perhaps not surprising that staff development tended to focus on the CRM system, leaving staff feeling that they could have had more support on integrating it within the IAG process. Whereas the majority of advisers thought that the structure did not reflect the IAG process, two new advisers thought that it provided a structure to follow. This latter point is of concern as professional advisers should be using models and structures informed by IAG research and theory, tailoring the process to the customer rather than following a rigid, technical model. This may reflect a tendency for advisers to receive training whilst on the job with CRM training possibly taking place before the underpinning IAG theory, models and skills. It is therefore important that advisers are trained in IAG models before or at least alongside CRM training in order to counter the potential for developing a rigid approach.

It has to be noted that the findings relating to implementation are perceptual and would need to be validated further through conversations with the Skills Funding Agency.

4 Conclusion and recommendations

4.1 Conclusion

The findings of questionnaires, focus groups, observations and interviews indicate that there are real benefits of CRM for the customer and organisation in terms of providing a more joined up service. However, the design of CRM combined with Next Step and Jobcentre Plus requirements has led to a situation in which a considerable amount of time can be spent inputting data in real time. Despite adviser attempts to creatively respond to the demands, the current requirements, combined with those of Jobcentre Plus, have created a challenging situation for advisers to navigate in which compromises are made to both the quality of relationship and service. Time spent data inputting impacts on the ability of the adviser to engage in deep and active listening as well as maintain the customer's engagement. This is particularly evident during action planning and, in the case of telephone sessions, at the start of the session. There is also evidence to suggest that advisers are consciously choosing to provide a lesser service to customers, failing to probe or address significant issues which may impact on the customer's ability to move forward and their future success.

4.2 Recommendations

4.2.1 Further research

To validate and extend the generalisability of findings, further research could include:

- A further comparison of customers referred from Jobcentre Plus with other customers in order to determine the extent to which it is the CRM *combined* with the Jobcentre Plus requirement to produce a CV that impacts on the relationship and service.
- An exploration of the customer's perspective of the impact of data inputting on the relationship. This would need preparative work to ensure that customers understand what is being measured i.e. the nature of an effective relationship and IAG process.

- Conducting a similar study in other regions to check whether the findings are transferable to other contexts
- Further observations to yield other ideas as to how advisers navigate the demands of CRM.

4.2.2 The implementation of CRM in the UK

Career guidance organisations elsewhere in the UK who are considering implementing CRM may reflect on the experience of the Adult Careers Service in England. As suggested by many authors on organisational change (Collins and Porras, 1996; Senge et al, 1999; Kotter and Cohen, 2002; Kotter and Rathgeber, 2006; Finnegan and Willcocks, 2007) a more *open* or *emergent* approach to change should be used. Practitioners should be involved at the outset, in the shaping of a vision that will win the hearts of all those involved. They should remain involved throughout an implementation strategy that remains flexible and adaptable in the light of feedback and changing circumstances. Equal attention should be paid to the strands of technology, processes and people.

4.2.3 Review of CRM for the National Careers Service

The Skills Funding Agency is currently reviewing the CRM for the proposed National Careers Service in England which should be in place by April 2012. It therefore seems critical that the practitioner voice is taken into account. Attempts should be made to consider how to reduce the time spent data inputting including a review of whether all the information asked for is absolutely necessary. In trying to do too much there is a danger of not achieving the core purpose of the service.

4.2.4 Staff development

A longer period should be given for staff to develop the skills required and involve more than IT training, being enabled to integrate guidance and technical competence. Advisers should be trained in IAG theory and models before or at least at the same time as CRM to avoid the adoption of a rigid and technical approach to what should be a professional and personalised service.

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Appendix I: Questionnaire - using CRM in an IAG setting

Information on the research

This research is independent in the sense that it has not been commissioned or funded by any external body. The purpose of the study is to explore how CRM is being used with customers and integrated into the interview process. Your details will be kept confidential and not passed on to your employer or any third party. The findings will be published as part of a dissertation and possibly as an article in an academic journal but your name will not be used.

Your name _____

Contact details (optional) tel no _____ email _____

I am willing to be contacted for further research purposes ☐

Q1. How long have you been working as an Adviser (Next Step and other companies)

Under 6 months ☐ 6-12 months ☐ 12-24 months ☐ 2years + ☐

Q2. What qualifications do you hold? NVQ3 ☐ NVQ4 ☐ DCG/QCG ☐

Q3 How long have you been using the CRM? _____

Q4. Do you mainly see customers in: groups ☐ individually ☐ 50/50 ☐

Q5. How would you rate your general keyboard skills in terms of typing speed?

Slow ☐ Satisfactory ☐ Good ☐ Excellent ☐

Q6. On average, how long does it take to input data for the CRM (**face-to-face**)

With a first time user? _____ With a returning customer? _____

Q7. How often do you use IT/ web resources other than the CRM with customers?

Rarely ☐ occasionally ☐ frequently ☐ most of the time ☐

Q8. Please identify any effects, positive and/or negative, of using the CRM with your customers
(**please continue overleaf if necessary**)

Positive effects of the CRM

Negative effects of the CRM

Q9. On a scale of 1-10, with 1 being negative, 10 positive, how do you rate the impact of the CRM on the service customers receive? (please mark with an x)

Negative 1 2 3 4 5 6 7 8 9 10 Positive

Appendix II: Practitioner observation schedule, part 1

Name of adviser	Date
Length of experience	
Qualification level	

Start time:

Time	Did	Said	Effect

End time:

Appendix III: Practitioner observation schedule, part 2

Overall observations

<p>Use of CRM – The process</p> <p>Timing/ when used</p> <p>Influence on flow</p> <ul style="list-style-type: none"> - Flexible/ tailoring or linear - CRM or customer centred 	
<p>Adviser/ customer relationship</p> <p>Level of rapport</p> <p>Time spent inputting data/ adviser facing screen</p> <p>Maintenance of relationship whilst data inputting</p> <p>Customer response to data inputting</p> <p>Level of listening (cosmetic/ surface/ active/ deep)</p>	
<p>Technical confidence and capability</p> <p>Ability to multi-task/ parallel processing</p> <p>IT skills/ navigating CRM</p> <p>Speed of typing</p> <p>Response to technical problems</p>	

Appendix IV: CRM interview questions

Adviser	Date
Qualifications	Length of experience

How would you rate your confidence in using the CRM – average, below average, above average?

What are your thoughts on the CRM?

Follow up if needed: do you think it has any impact on the relationship with the customer? if so, how?

Reflect back on tactics observed – could you tell me more about those tactics?

Any other thoughts?

Appendix V Questionnaire responses: Question 8

Perceived effects of using the CRM

(numbers indicate similar comments made)

Positive effects of the CRM

Joined up service (21 comments)

14 Data once input is retrievable anywhere/ anyone can look at the information – telephone adviser, face-to-face etc/ easily accessible record of action plan and who they have seen etc/ all info is held in one place/ traceability – being able to look at client records of customers from all over the country/ looks professional/ uniform and clear/ easier to see action plans of clients if they have been seen at another centre/ easier to access previous interventions

1 can access information anywhere with internet

2 Client info can be recalled quickly for further sessions

2 records progress of the customer and they don't have to repeat information

2 Can update info easily and book appointments on system

Administrative improvements (13 comments)

1 environmentally it is paperless (apart from printing off action plans)

1 Data is uploaded instantly/ goes straight through to Next Step

7 Live time finishes the paperwork right there and then/ less admin time

1 accountability/ keeping records

3 Time consuming but user-friendly – not hard to use/ fairly easy to use when you get used to it

Quality of Action plans/ immediacy for customer (13 comments)

Clear and legible action plan produced/ Can set SMART action points/ easy to add to other advisers action plans/ action plan is tailored to clients needs/ Customers get typed action plan immediately/ have something to take away/ good

To read and understand for customers/ end result looks great to customer/ client friendly/ pre-populates action plan with personal details

IAG process (3 comments)

2 Assists with structure of intervention (both NVQ 3, new advisers 6-12 months)

1 can do follow up and clients are more approachable

1 client understands what is going on and they can see their data

Negative effects

Time spent inputting data/ effect on customer (23 comments)

23 Spend more time looking at screen than at customer/ missed contact time with client/ feel am not giving client full attention/ too much data required/ time it takes/ customer can feel that they aren't being listened to (2) Time spent inputting could be more usefully used with the client/ takes too much time away from interaction with customer/ takes focus away from customer as you concentrate on making sure you've entered everything/ less communication with clients as sometimes it feels that the CRM is a priority rather than the customer/ depending on layout of room, sometimes you can have your back to the customer for longer than is comfortable/ having to focus on the computer whilst wanting to settle in customer/ having to type whilst they are there/ difficult to maintain eye contact/ feel am talking to computer not to the individual/ you spend more time inputting data than actually speaking with client, so service isn't as good/ can interfere with customer interaction and take attention away from customer/ silences, sometimes hard to multi task and clients will go quiet/ eye contact lost and dynamic of interview changes/ can be intrusive and time consuming, especially if there are technical problems

1 clients have language barriers/ don't understand

Design of system/ impact on customer (8 comments)

1 restriction with text size (too small) for some clients

3 Interrupts flow of interview/ conversation/ Doesn't work in a logical way

2 effects quality of action plan/ not as extensive as have to do it quicker

1 data protection issues means that you can't mention health and convictions so sometimes the action plan has less meaning

1 with repeated session action plan is too long – prints out all sessions

Design of system/ impact on advisers (4 comments)

3 Too many windows are open/ too many tabs

1 restricted to 4000 characters

Technical difficulties (20 comments)

13 Technical problems – timing out when talking to client (2), freezing, sometimes action plans don't load up/ system too slow (especially at job centre)/ customer has to wait for printing and uploading when systems aren't working/ crashing and losing half an hour of data/ switching to manual system and so doesn't leave good impression on the client (1)

1 raises stress/ anxiety of adviser when system isn't working

3 Find it hard to follow instructions of the CRM / complicated/ you need to be technically skilled at IT

3 Time span and computer access effects flexibility of location of interventions/ length of time inputting if done via outreach with no internet access

Appendix VI: Results of focus groups

Time spent inputting data/ effect on customer

Problem	No	Solution	No.
IT capability – depends on your typing speed and IT capability.	2	Touch typing / IT skills training. Need ongoing support via helpline and simpler user guide and troubleshooting guide for when things go wrong. Also need follow up training (not just one-off)	6
		Use voice recognition/ speech entry so that you don't have to type	1
		It does get easier with practice	1
Time consuming/ impact on quality too many screens – too complicated and time consuming to flick back and forth/ find what you're looking for The quality of the interview suffers and also the quality of the action plan as you have less time – it's not as extensive. You have spent so much time on the computer that you don't want to spend more time on it.. Hard to keep rapport at same time. Time spent means individual receives less IAG and face to face service	4	Shouldn't have to keep 1-10 screens open and going back and forth. Reduce number of screens. Could have 1 screen for CRM client information which takes 5 mins max to complete. Remove intervention entry – doubles up with current situation	1
		Phone client before hand to get some of the information	2
	4	Could do mass input if it's a group session (used to do it with insight)	1
		Skills and work goals can be put in bullet points, short and long term	1
		Give them a management information form to fill in whilst they wait for an appointment. Type in less relevant data after the customer has left.	2
		Focus on client and fill in CRM after	1
		Receptionist to input personal details first so there's not so much to do in the interview/ can focus on client	1
		Do typing whilst you give them a task	2

		<p>such as adult directions or give cup of coffee (but some clients don't like this – they want your attention)</p> <p>Use templates which you cut and paste to individualise for each client</p> <p>Need space/ room so not disturbed</p> <p>Visit organisations that are getting it right</p>	<p>2</p> <p>1</p> <p>1</p>
Inputting the separate action items is time consuming – repetitive and slow – boring for client	2	Group the action plan items, give one heading and input in one go	2
Impacts on credibility. System crashing or being very slow. When it goes wrong you have to apologise to the customer. Makes adviser look incompetent	3	Don't apologise too much	1
Trying to relate to the customer whilst typing. Difficult to get body language right (turn away from person). Awkward silences		<p>I'm a touch typist – if I wasn't it would slow me down. People need typing training</p> <p>Engage the client whilst typing action plan – reflect back, check their reaction, make them part of completing it (but this does take longer!)</p>	<p>1</p> <p>1</p>
Inflexible/ Impersonal. Not customer friendly/ focused. Rigid - the flow of the input doesn't reflect the conversation/ tends to make you follow an order – otherwise you get lost in the system. Hard to go back. You end up concentrating on the system, not the client.	9		
Stress – affects delivery and performance	1		
Total comments	25		29

2. Design of system/ impact on customer

Problem	No	Solution	No.
Font etc You can't insert pictures, alter the font/ put in bold. This should be an option for clients with learning disabilities and difficulties. Text is too small.	1	More flexibility to allow for changing font, use pictures, highlight, bold etc.	1
Priority group categories Sometimes the categories you have to put clients in don't fit the person Too rigid and narrow	1		
Postcode New address won't validate – if someone is in a hostel or refuge – won't accept PO boxes. Have to have a postcode – they're eligible but we can't be paid so can't be seen	1		
Action plan Your action plan gets added onto previous action plans and so the whole lot is printed out for the customer – too long and a waste of paper. Have to wait for action plan to upload and print Can't revise previous action points if client's priorities have changed – have to print them all out again. The action plan items end up not being in the relevant order	2	Should be able to amend action points if not relevant anymore or at least not print the whole lot out	1
Data protection Not allowed to mention health and convictions on the action plan – may be very relevant – can set client up to fail if it isn't known.	1	Need Adviser's secret notes page to comment on behaviour, criminal record, health etc	1
Multiple use there's too much information to gather that has no relevance for the customer	1	Delete screens that aren't important (that are for research purposes rather than the customer)	1
Total comments	7		4

3. Design of system/ impact on advisers

Problem	No	Solution	No.
Inputting deadline Have to input all the data within 24 hours of seeing the customer – when it crashes or you don't have access to the web (outreach), if you're not at work the next day, for example if you work part time, you have to do it at home in your own time. Yet you're not supposed to take customer data home. Its hard to balance doing it in work time/ targets with part-time work	3		
Inflexibility Advisers can't be report viewers (change their mistakes) Have to remember to click on history to see how often they have been Can't collate and print out lists e.g. to see all who did not attend	1 1 1	– should they be able to be? This should come up automatically on first screen	1 1
Not enough safety nets – should stop you from making mistakes on screen	1	Safety nets e.g. e.g. 'you haven't attached action plan'	2
Administration Have to wait 2 weeks to a month for a new adviser to get log on details	1		
ISP (domain) doesn't pre-populate ... have to put your details in every time	2	It should recognise you and pre-populate your details such as telephone number	4
Complexity Too many drop down boxes	2		
Implementation It seems like it was invented by technical people who don't understand the relationship or process. It wasn't trailed. Therefore get constant e-mails about changes	5	Have guidance people involved in design Should have had a 6 month trial before rolling out	2
Payment Can't claim for positive impact outcome without customer giving copy of payslip – this requires too much effort by the customer	1	Should be able to claim without payslip. Link to DWP data base and take person off list if employment found	2

Environmental concerns Paper work (signed action plans) sent to Guideline – waste of paper	1	Electronic signature pad for customer to confirm they had action plan	1
Health and safety Ergonomics – having to twist to input data and keep eye contact going	1		
Times out – after 15 minutes. This is too short a time. Have to re-enter what it too complicated a password	6	Complete off-line and upload at end or after Longer log out time	3 1
Total comments	26		17

4. Technical difficulties

Problem	No	Solution	No.
Date function sometimes doesn't work	1		
Reliability Not reliable – crashes. Often slow – I have no faith in the system – technically it fails you/ crashing etc.	6	All servers to be working /able to cope with volume. Faster service	2
Access Need access to computer and printer – when working out in the community/ outreach, this isn't always possible. Also we have printer in next room – which means you have to leave client alone	2	Access to printers, laptops and dongles when working away. Printers with every computer	1
The dongle is slow	1		
Total comments	10		3

Appendix VII: Triangulation of questionnaire and focus groups

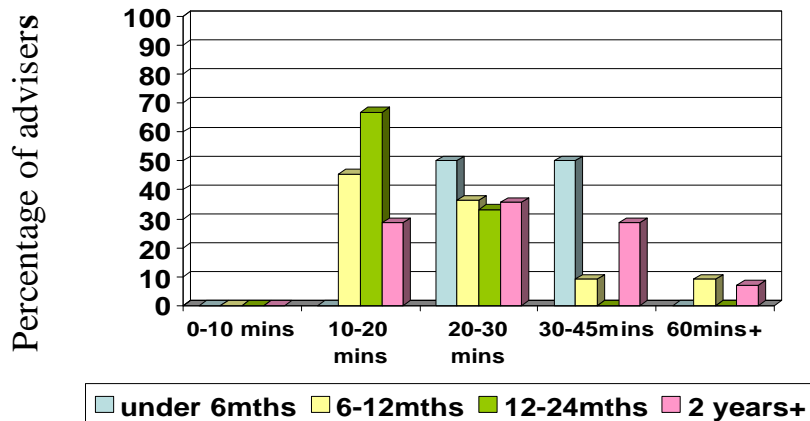
Responses to Q8 the disadvantages of CRM - focus groups, problems of CRM

<u>Questionnaire</u> – issues only raised in questionnaire	Issues raised by both methods	<u>Focus groups</u> – issues only raised by focus groups
clients have <u>language barriers</u> / don't understand	<p>1. Impact on relationship</p> <p><u>Time consuming</u>: spend more time looking at screen than at customer. Hard to multi task. CRM is priority rather than the customer. Reduces time spent with client</p> <p><u>Rapport</u>: not giving full attention to client; Impersonal/ customer can feel that they aren't being listened to; Interferes with rapport; Awkward silences</p> <p><u>Eye contact</u>: Difficult keeping eye contact/ having to type whilst they are there.</p> <p><u>Irrelevant</u>: Too much data required, not relevant to client</p> <p><u>Quality</u>: Effects quality/ service; Dynamic of interview changes</p>	<p>Depends on your <u>typing speed</u></p> <p><u>Impact on other ICT use</u>: Don't want to spend more time on computer as spent enough time on it already</p> <p>Inputting separate action plans is <u>slow/ boring</u> for client</p>
<u>Restricted</u> to 4000 characters	<p>2. Design of system/ impact on customer</p> <p>Interrupts <u>flow</u> of interview</p> <p><u>Too many windows</u>/ screens</p> <p><u>Quality of action plan</u> not as good as have to do it quicker</p> <p><u>Data protection</u> - can't mention health and convictions so action plan has less meaning.</p> <p>Prints out all sessions – <u>action plan too long</u>.</p> <p><u>Text size</u> too small</p>	<p><u>Font etc</u>: Can't insert pictures, alter the font/ put in bold. Needed for clients with learning difficulties.</p> <p><u>Priority group categories</u>: the categories don't fit the person/ too narrow</p> <p><u>Postcode</u>: If someone is in a hostel/ refuge, won't accept PO boxes. Can't be paid for/ be seen</p> <p><u>Action plan</u>: can't revise previous action points so that items are not in relevant order</p>

	<p>3. Design of system/ impact on advisers</p>	<p><u>Inflexibility</u> Advisers can't change their mistakes. Can't collate and print out lists e.g. to see who did not attend. Not enough safety nets – should stop you from making mistakes on screen <u>Administration</u> Have to wait 2 weeks to a month for a new adviser to get log on details <u>ISP (domain) doesn't pre-populate</u> have to put details in every time <u>Implementation</u> Seems invented by technical people who don't understand the relationship or process. Not trialled. <u>Payment</u> Can't claim for positive impact outcome without customer giving copy of payslip – this requires too much effort by the customer <u>Environmental concerns</u> Copies of paper work waste of paper <u>Health and safety</u> Ergonomics – having to twist to input data and keep eye contact going</p>
	<p>4. Technical problems <u>Times out/</u> logs out. <u>Crashes/</u> freezes <u>Slow</u> – especially loading up action plans. <u>Credibility:</u> doesn't leave good impression on the client. <u>Stress/</u> anxiety of adviser when system isn't working Find it hard to follow instructions of the CRM / <u>complicated/</u> you need to be technically skilled at IT <u>24 input rules</u> <u>Access</u> problems where no internet access</p>	<p><u>Date function</u> sometimes doesn't work The <u>dongle</u> is slow</p>

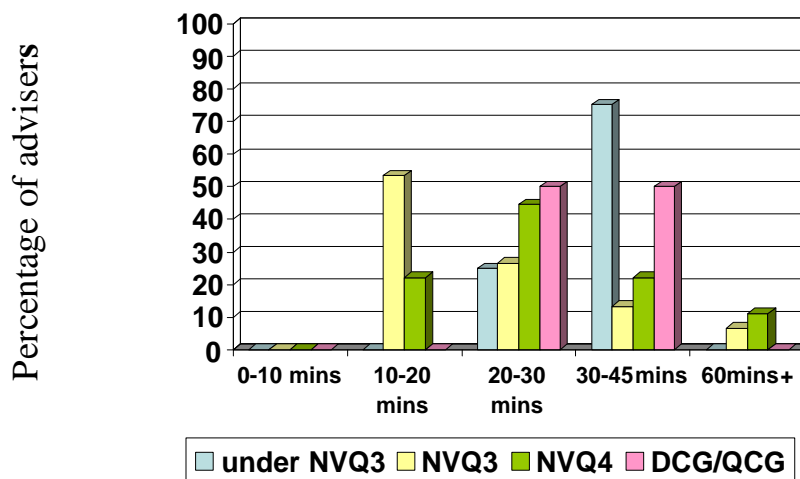
Appendix VIII: time spent inputting data on first appointment

Figure VIII.1 Time inputting data (1st appointment) according to length of experience



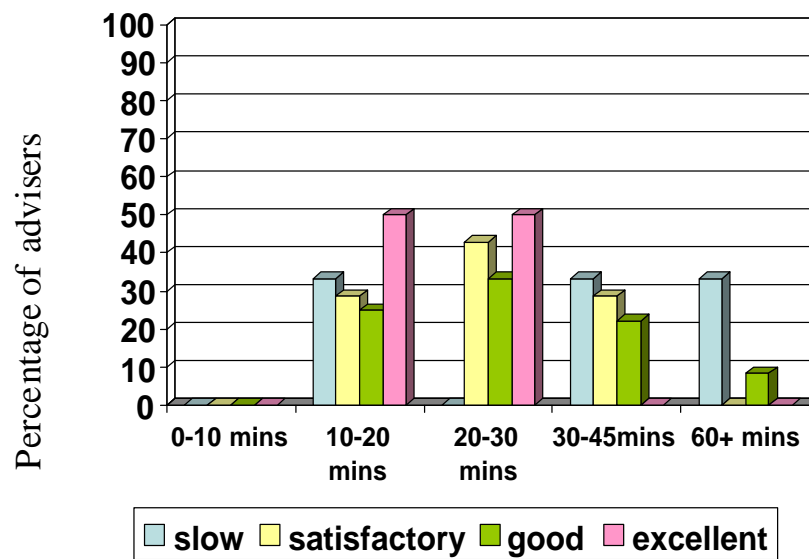
Out of the 30 advisers who returned their questionnaires, 2 had under 6 months experience, 11 had 6-12 months experience, 3 had 12-24 months experience and 14 had over 2 years experience. From the data it would appear that those with 12-24 months experience take less time than those who are less and more experienced. However the numbers involved are too small to draw any firm conclusions.

Figure VIII.2 Time inputting data (1st appointment) according to level of qualifications



Out of the 30 advisers who returned their questionnaires, 4 were working towards NVQ3, 15 had NVQ3, 9 had NVQ4 and 2 had DCG/QCG. The less qualified (below NVQ3) and most highly qualified (DCG/QCG) take 20-30 minutes (none of these respondents took 10-20 minutes) which might suggest that NVQ3 and 4 are quicker but on the other hand, two of these respondents took 60 minutes+. Therefore no firm conclusions can be drawn.

Figure VIII.3 Time inputting data (1st appointment) according to typing speed



Out of the 30 advisers who returned their questionnaires, 3 rated themselves as 'slow' typists, 7 as 'satisfactory', 12 as 'good' and 8 as 'excellent'. In terms of time spent inputting data, those who are 'slow' are evenly spread. Those who are 'good' reflect the general trend in terms of time taken. Those who are 'excellent' reflect the general data that most people either take 10-20 minutes or 20-30 minutes. Therefore no firm conclusions can be drawn.

Appendix IX Comparison of face-to-face observations

	Observation A	Observation B	Observation C	Observation D
Adviser quals/ experience	11 years NVQ4 (with learning programme)	8 years NVQ4 (with learning programme)	7 years NVQ 4 (with learning programme)	10 years + NVQ4 (but no learning programme)
Length of session	52 minutes	90 minutes	68 minutes	73 minutes
Setting	Private room Sit facing each other. Computer in between. Swivel chair for when inputting.	Open plan Sit facing each other. Computer in between. Swivel chair for when inputting.	Private room Sit facing each other. Computer in between. Swivel chair for when inputting.	Private room Sit facing each other. Computer in between. Swivel chair for when inputting.
Customer	Sent by job centre to get CV. Long term sick/ on benefit. Seeking work.	Sent by Job centre to get CV. Made redundant. Seeking work.	Sent by Job centre. Resigned from job. Seeking career change and 'inspiration'.	Sent by job centre to get CV. Long term sick/ on benefit. Seeking work.
Use of CRM				
Admin support	None	Admin inputted basic details before interview – saved 5 mins inputting	None but client completes paper MI form whilst waiting	None
Timing of use	Throughout – didn't log out Action planning 18 mins	Adviser spent 5 mins before appt to input data, create service activity and current situation on action plan. With client, 15 mins at start inputting (driven by use), left CRM for 50 mins, then returned to complete action plan (20 mins).	Completed basic MI info – 3 mins. Then opened up word doc – 2 mins. Then left computer alone until action planning.	12 mins at start – chatting whilst typing 24 mins action planning.
Flexibility	Linear – follows CRM structure. Jobcentre agenda (CV) drove session –	Flexible – doesn't drive structure (only at start).	Flexible – doesn't drive structure – briefly at start	Linear - driven more by Jobcentre agenda (CV) Had to make his story fit the action plan criteria

Relationship				
Level of rapport	Excellent	Very good to Excellent	Excellent	Good (customer had hangover)
Time spent inputting/ looking at screen (intermittent eye contact)	67% 35 minutes of 52 minute session. NB some of this time spent writing CV 23 mins inputting on CRM without CV	41% 35 mins of 85 minute session. (mixed with discussion to make it more discursive) 10 additional minutes without customer face to face. NB 25 mins inputting CRM without CV	29.4% 20 mins inputting CRM (3-5 at start, 3 on CRM, 2 mins word doc) 15 at end on action planning	49.3% 12 mins at start – chatting whilst typing 24 mins action planning. 36 mins inputting CRM
Time spent in complete silence when inputting	3 mins 40 second in total. Longest period 20 seconds	4 mins, longest period 25 seconds – during action planning	30 seconds	3 mins Longest 20 seconds
Tactics for maintaining relationship whilst inputting	Humour. Neutral talk e.g. about his dog. Stays in straightforward/ neutral topics when typing. Talking whilst typing. Intermittent eye contact. When silent, gives client task to complete	Didn't face screen straight away. 2 mins eye contact, warm introduction, neutral chat to settle customer in. Talking whilst typing. Intermittent eye contact.	Didn't face screen at start. 5 mins eye contact, discussing purpose of session. Stays in straightforward/ neutral topics when typing. Talking whilst typing. Intermittent eye contact Involves customer in action planning/ asking her to summarise whilst typing	Asking customer questions to check facts. Talking whilst typing. Intermittent eye contact.
Level of listening	Active – reflecting back issues but not emotions Not deep listening – glaring issues not probed	Active to deep listening – empathetic didn't miss what the client said. Picked up and probed	Active to Deep. Active when typing. Deep when not – used intuition, reflected back more than was said/ sense of what was going on.	Deep when not facing screen. Misses cues when action planning - surface

Customer response to data inputting	Good when there's interaction. Silences – stares into space.	Good at start as involved (smiling/ nodding). During action plans it is summarising/ less involving. During last 20 mins customer sighs twice, looks at his watch. Adviser is facing screen/ cannot see this. Long silences as adviser uploads action points .	Good – involved all the way through	OK at start - polite/ understands. As it progresses - distracted/ goes flat/ stops joking. Action planning part at end – client loses interest. Head in hands (hangover?), looking at pictures on wall. Minimal responses
Technical competence				
Multi-tasking	excellent	Excellent – confident with IT. Limits need to multi task by differentiating – splits CRM and guidance	Excellent – limits need to multi task by differentiating – splits CRM and guidance	Excellent generally but listening effected when typing action planning
IT skills/ navigating CRM	Confident navigating. Used templates	Excellent. IT project manager in previous career. Regarded as CRM expert. Moves through pages easily. Used templates.	Excellent – regarded as CRM expert.	Confident in use of CRM
Speed of typing	2 fingers - slow	Satisfactory to good. Not a touch typist.	Fast	Touch typist
Response to technical problems	No problems occurred	System is slow 3 times during interview. Stays calm. Uses humour about IT 'speedy isn't it ... takes your breath away doesn't it?' Customer laughs.	Comments on slowness of CRM – uses humour. Customer laughs back.	No problems occurred
General use if ICT	No problems occurred	Uses web site to show job profiles for use in CV building in addition to CRM	Refers customer to web resources for building CV	Shows customer web site
Impact on level of service				
Advice or guidance?	Responded to presenting need. No probing of high leverage issues - (impact of mental health on job search)	Advice and Guidance. Tried to do both- meet Job centre demands and go deeper.	Guidance – went for high leverage issues (not following dreams/ fear). Signposted client to meet CV needs (presenting issue)	Advice: driven by need for CV. high leverage issues not probed (impact of alcoholism on job search, comfort zone, 3 years unemployed, no review of why)

Appendix X: Comparison of telephone observations

	Observation E	Observation F	Observation G	
Adviser quals/ experience	NVQ4 (with learning programme)	NVQ4 (with learning programme)	NVQ 4 (with learning programme)	
Length of session	41 mins	36 mins	21 mins	
Setting	Call centre. Hands free headset. Facing computer	Call centre. Hands free headset. Facing computer	Call centre. Hands free headset. Facing computer	
Customer	50+ female considering career change from banking	Female considering changing career from music teaching	Male in 20's applying for graduate position. Wanting CV checking	
Use of CRM				
Admin support?	None- direct call	None- direct call	None – direct call	
Timing of use	3 mins at start – gathering basic info 9 mins action planning. 41 min CALL – 12 MINS CRM but includes action planning and additional discussion – client involved in coming up with action points – would have to see action plan to see if its extensive – has adviser typed it up as she has gone along or does she do it afterwards?	(7mins) 4 mins at start. 3 ins action planning – but didn't seem to have to summarise current situation etc – would have to observe to see if this is done throughout or afterwards	3 mins 2 mins clarifying reasons for call and responds/ contracts before using CRM. Not driven. 3 mins at start. No action planning.	
Flexibility	CRM drives it at start but then flexible	CRM drives it at start but then flexible	Flexible. CRM woven in well	
Relationship				
Level of rapport	very good – reflecting back. Empathic - except at start when focused on CRM	Very good – reflecting back, empathetic tone. Except at start when driven by CRM – 6 minutes after asking how can I help and getting a detailed response,	Excellent – reflective statements, empathy, humour (both together)	

		adviser asks again 'have you got sort of set questions that you would like answers to?'		
Time spent inputting/ looking at screen (intermittent eye contact)	Not known	Not known	Not known	
Time spent in complete silence when inputting	none	None – there are silences but its where the adviser is looking something up or customer is reading info off web	None	
Tactics for maintaining relationship whilst inputting	Constant dialogue Asks customer to come up with action points	CRM bit at start – no attempt really – lots of closed questions to gather info quickly. Brief responses by customer. But uses soft tone to soften experience. Asks customer to come up with action points	Involves customer and uses reflecting back to demonstrate listening and interpret – e.g. 'okay so it's just a fill in job then really, but it's maybe extended longer than you might have done when you first went there' 'and you mention that you've been looking around for a job for a while so am I right in thinking that you might be claiming job seekers allowance?'	
Level of listening	Poor at start – CRM impact – asked twice what customer wanted from session because of having to interrupt and gather data. Also got it wrong when reflecting back – thought customer had asked for information Active for rest of interview – reflecting back Potential for deep listening - are you feeling quite disillusioned with the banking world?	Good initially but so much time had lapsed since first asking customer what she wanted that adviser seemed to have forgotten and had to ask again Active for rest of interview – reflective - but could be more empathic and pick up on customer's tone (frustrated at situation and barriers) Adviser lack of skill rather than CRM?	Active/ deep throughout – reflecting back more than was said e.g. 'it sounds like you're really inspired with this advert' 'it still doesn't seem quite right to you?'	

Customer response to data inputting	No problem/ impact	Short answers at start – not good not bad. Just compliant in tone.	No problem – good rapport maintained	
Technical competence				
Multi-tasking	Excellent – except for start, able to talk whilst using web	V good except at start when doing CRM – using web but signposts what she is doing to explain silences	V good – but didn't have to do a lot – focused on client/ not using other resources	
IT skills/ navigating CRM	No problems apparent	No problems apparent	No problems apparent but not used fully	
Speed of typing	Not known	Not known	Not known	
Response to technical problems	None – does joke about it being slow	none	none	
General use if ICT	Uses web to look at job profiles	Uses web to answer specific questions	Didn't use it	
Impact on level of service				
Advice or guidance?	Advice. Could be guidance – there's opportunity but adviser too quick to go into information giving and jump on the career idea.	Advice Could be guidance – there's opportunity but adviser focuses on information giving.	Advice but was appropriate for this client – had a pressing presenting issue	