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Charter Mark is dead. Long live CSE!

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What is it?

Those of us of advanced years, who remember O-levels, will possibly read CSE and think 'second best'. Not so – CSE now means Customer Service Excellence and is the new award that is gradually replacing Charter Mark. Like Huddersfield, many University libraries will already have Charter Mark and be wondering how best to move on, others will be considering the award for the first time. I will try to make this equally accessible to both.

So, what is CSE and how does it differ from its predecessor? The Cabinet Office states that:

‘Customer Service Excellence aims to bring professional, high-level customer service concepts into common currency with front line public services by offering a unique improvement tool to help those delivering public services put their customers at the core of what they do.’ [1]

CSE was launched on March 10th 2008 after an independent review of the Charter Mark scheme by Bernard Herdern, whose report, published in 2006, [2]recommended a new standard based on the key drivers of satisfaction. Applications for Charter Mark have now closed and, as certificates last for three years, the scheme will finally end in June 2011.

What came first?

At the University of Huddersfield we first considered Charter Mark for our library services in 2004 and actually achieved it in 2005. Current holders will know that a 12 month follow up visit is necessary to confirm the award and then three years of surveillance or continual assessment before the next big assessment. For us, because we like a challenge every year, we completed our 12 month follow up in 2006, then in 2007 added our new Learning Resource Centres at University Centres Oldham and Barnsley and also our Archives service which is located within the library. The expected follow up visit for the Centres and Archives should then have taken place in 2008, with a full assessment of library services due in 2009.

As Chair of our (then) Charter Mark Working Party, I read the draft statement for the new CSE standard, released in November 2007 and experienced what I can only describe as a ‘moment of madness’ when I decided that we should consider skipping the comparatively easy follow-up year and have a go at the new award. I consulted my Head of Library Services and our Charter Mark assessor, hoping that they would dissuade me, but both felt that we could and should do it. Our assessor recommended a pre-assessment visit in the spring of 2008 just to make sure we were ready, as failing to get CSE status would mean we would also forfeit Charter Mark status. Not a decision to be taken lightly.

How do you get it?

For those considering the award, a team of people, preferably from different areas of the library service, is essential, as is the support of senior management. The real benefits of the award will only be felt and only be achievable, if all members of the service buy into the concept, as opposed to regarding it as a tick-box exercise to receive a certificate (and logo) and a letter of congratulation from the Prime Minister. In 2004 I was one of the cynics, which may be why I was subsequently given the lead, but as I have seen the improvements in our service and read the comments on excellent customer service in our surveys, I have been converted to advocate, with all that missionary zeal which accompanies conversions!

Articles have already been written about preparation for Charter Mark^[3] so, rather than rehash the advice given there, I will concentrate on what CSE means and how we went about getting it. As we were trying to achieve a great deal in a short time, we set up a subgroup, consisting of myself, Sue White (Head of Library Services) and Jane Kaye (Learning Resource Centre Manager, Barnsley). To kick start the project, we initially met at least every two weeks in the first two months of 2008 and each time spent around two hours brainstorming our way forward. It became evident very quickly that everything hangs on the successful identification of your customers: of the 57 criteria that you have to fulfill, criterion 1.1.1 states:

'We have an in-depth understanding of the characteristics of our current and potential customer groups based on recent and reliable information.'

The Cabinet Office web pages describe this as customer segmentation:

'Segmentation provides valuable insight in to how to provide the best service for all customers by focusing on their needs, motivations and choices. It helps services to move away from the idea that 'one size fits all' for customers.'

Get this right and you will find that everything else falls into place. You may have already been doing some work, as we had, into assessing the needs of different customer groups, for example, users with disabilities, international students, researchers, which will provide you with some ready made evidence, for you will soon discover, if you are not already a Charter Mark holder, that evidence, and lots of it, is the key to success. Try to ensure that you have someone in your group who has experience of compiling a portfolio of evidence and the attendant skills of producing a cross-referenced matrix, and start work. Although, in your segmentation, you will need to be able to identify each customer down to an individual level if necessary, we found it easiest to create a flow chart containing broad groups of users, each then leading to a breakdown of those groups with some (disabled users, for example) inevitably overlapping. Make sure you remember potential users and non users (Criterion 1.1.3 'identify hard to reach ...'. We accompanied this, by now very colourful, flow chart with a short description of each customer segment and (Criterion 1.2.1) quickly wrote a strategy and schedule for consultation. In fact we were pleasantly surprised, when we put our schedule together, by just how much consultation we were already doing in the shape of surveys (in house and national), focus groups, questionnaires, student panels etc.

Once you have your segments and your schedule, you will be able to identify any gaps in your consultations and immediately take steps to fill them, remembering to feedback your findings and any action taken.

Two aspects of the criteria gave us cause for concern:

1.3.1 We use reliable and accurate methods to measure customer satisfaction on a regular basis.

Words like 'methodology' and 'sample sizes' give me nightmares and if, like us, you are grateful if anyone turns up to a focus group or fills in a questionnaire, depending on the size of the bribe, then you will probably worry that your methodology and the Cabinet Office's requirements are some way apart. Add to that a University directive not to overload students with surveys and you may feel that you have a problem on your hands. We consulted our assessor, added a statement to our strategy about the difficulties of perceived over-consultation, found some methodology statements for the national surveys and suddenly it didn't seem so bad.

1.3.5 We have made positive changes to services as a result of analysing customer experience, including improved customer journeys.

Customer journey mapping looms large on the Cabinet Office site so that we felt we had to give it some special attention. Fortunately we were able to look back at the reviews of the different services which had been undertaken over the last two years in the library and revisit the process maps which we had created to show where changes might be necessary. Some of these – book renewal, inter library loans procedure, help desk configuration – had all led to improvements in the customer journey and could be used as evidence. But CSE is all about continuous improvement, so we needed, and still need, to look at other journeys which could lead to future benefits for our customers. Again, a flowchart is probably the best way to map a customer journey and if the flowchart becomes too complicated, perhaps this is an indication that the journey is too.

Skip forward to *Criterion 4 – Delivery* – and you will understand why so many organisations now have customer service standards on their web pages. For Charter Mark we had gradually increased the number of our standards until this year we had 30 – almost all quantitative and all needing regular monitoring. We were bored with them, our customers probably never bothered to read them and our staff were fed up of collecting and collating data. We didn't have time to change *and* monitor our standards before our assessment and admitted as much to our assessor who agreed and suggested that we now select between 10 and 20 qualitative standards which would be far more meaningful to our users. Google 'customer service standards' and identify a few good ones, making sure you consult your staff and your users to see what they think. As our assessor said, you can always run all your KPIs in the background to create any quantitative data which you might need. Then make sure in any surveys you run, that you ask questions which give you the required data to monitor the standards you select and make sure your users know about it.

Result!

After all our hard work, our two days of assessment were actually quite enjoyable, particularly when we were told we were successful and that we had achieved Compliance Plus in two areas. We had a few partial compliances – inevitable when you consider the amount of work we had to put into such a short time, but we can now look at getting those right for our follow up visit in May 2009. The main advice I would give anyone considering the award would be: don't underestimate the amount of work you will have to do and don't forget to put your customers' needs first in every decision you make. Celebrate what you already do well but always stay focused on what you could do better.

The CSE mantra should be

- Consult
- Feed back
- Take action
- Consult again

No handy acronyms there!

What next?

We have already had several requests for advice from colleagues in other University libraries and, if there is sufficient demand, we would be happy to run a workshop in Huddersfield. Please get in touch if you would be interested.

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