

...In The Eye Of The Beholder

The Halifax Group Technology & Operations Division, as with all service management teams, sets out to deliver the maximum value to users of their services. As a manager in the Operational Excellence Programme, Alan Kaye is responsible for identifying and removing the obstacles that prevent users from being most effective. Here he describes how he has successfully used "perception gap analysis" to identify and address the root causes of the problems perceived by users. This approach also reveals the perceptions of IS division employees and uncovers some surprises! The differing perceptions of these two groups is a powerful catalyst for rapid change and improved partnership between the IS division and its customers.

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If you really want to have an impact on your users then you have to start by seeing the world through their eyes. The Group Technology & Operations Division at Halifax has spent valuable time doing just that; identifying hundreds of root-cause problems, getting them ranked by different segments of our user population and addressing them in their priority order, by using the **Catalyst Process**. As a result we have been able to make changes that have significantly improved our users' effectiveness as well as their opinion of information systems.

What Happened?

We had spent some time and effort using questionnaires to try and gauge our users' satisfaction with our service and the nature of their problems. What worried me most was that we wrote the questions. Nobody was really sure, including myself, whether we were asking the right ones. It quickly became apparent that we weren't, because it was often not clear what action to take when the results came back.

And worse still, we only ever got a small percentage of the questionnaires returned, so we were missing the views of the "silent majority". It was the idea that you could get an 80% to 90% user response rate that first attracted me to the Catalyst approach.

Unearthing The Real Issues

It is really interesting to dig down to root causes because they are usually so simple that you can take action quickly. Of course, not all of the changes are easy, but many are. For example on an early project we found that our users had

various high-ranking problems with their PCs and fax machines. The statements themselves showed clearly that the vast majority of users were not aware that we had a major replacement programme underway. Not surprising really since we hadn't told them; we'd been too busy getting the job done! A simple announcement and the problems went away!

On the other hand it was clear that the users were having a great deal of difficulty with the internal telephone directory and it was our fault according to them. In fact it was nothing to do with us, except that it was delivered by IS to the desktop. But because the users' perception was that it was an IS problem, we ensured it got fixed.

We have also unearthed some interesting technical difficulties. For example, staff mobility within a branch requires multi-functional access to a variety of workstations and as a result, getting in and out of the various systems needs to be very efficient. Investigation showed that staff do this more frequently than we had imagined and that in fact the frequency is increasing. It has been quite difficult to develop ways to overcome this but we knew how important it was to the business. When I visited a branch recently where we were piloting a solution, they were really delighted with the improved functionality.

Often the problems that our users are struggling with are not simply 'technical' but are related to fundamental business or banking issues. The users do not separate these from the services we are delivering. Knowing the detail of those problems gives us an inside track with the Business Executives because we can help them with their business, not just their computers.

Ranking is an important part of the process as it tells us what to do first if we



are to maximise our impact on the business. It also, on occasion, tells us what not to do. Sometimes, users do not perceive a problem, yet we may be planning to find a solution to it.

How Do We Find Out What Our Users Are Thinking?

There are many ways of obtaining user feedback. As the song says, "it's not what you do it's the way that you do it!" Working with a Catalyst facilitator, we followed the process shown in figure 1 (see top of page 12).

Each "snowing group" includes about 15 typical users plus the facilitator. Members of the IS division are quite deliberately excluded to ensure that the users can voice their opinions openly. The facilitator extracts root-cause problem statements from these groups by exploring the causes of their concerns in quite a unique process. Typically some 500 problem statements will then be clarified, de-duplicated and consolidated in the second team meeting. We run the snowing groups close to the users' offices, as far apart as Edinburgh, Bristol, London, Birmingham and Newcastle.

Having identified our set of 150 or so problem statements, we then go on to get them ranked. The 'CatMat interviews' ▶

Figure 1

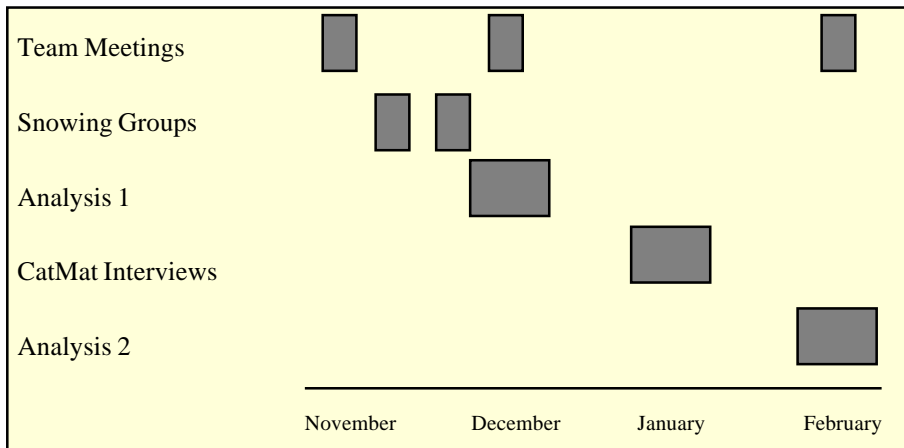


Figure 2

Problem Statement	User Rank	IS Division Rank
I have to wait for the help desk to reset my password rather than my supervisor	7	44
The photocopiers are not of sufficiently high quality	13	115
I do not know how to cancel a print instruction when I change my mind	19	97
Nobody has shown me how to solve the simple Printing problems	40	112

consist of a set of cards (with a problem statement on each card) and a sorting mat or tray. These are sent out to about 300 users and IS department employees. It takes a user about 15 minutes to sort the cards by importance and they are then returned through the post for data entry.

What Sort Of Results Do We Get?

A high response rate, typically over 80%, so we can have confidence that we are

looking at the perceptions of the majority. The Catalyst process generates a problem statement “top sheet” listing the problems by rank and several detailed reports by user segment. Figure 2 shows some typical ranked problem statements and illustrates quite dramatically the perception gaps between users and IS division employees.

Other reports show the problem statements:

- ranked in order of importance by

specific segments of the user population

- ranked in order of importance by IS employees, showing perception gaps
- clustered by key problem areas that enables us to focus on developing solutions and taking action

Final Thoughts

We’ve used the Catalyst Process several times within different areas of the business over the last three years. Each time we’ve both discovered many new perceptions and improved the service we provide to our users. We can see this clearly where we have taken action and then repeated the process with particular groups.

Sometimes the process reveals a business problem unknown to the Business Executive rather than an IS service problem. By identifying the problem clearly and providing a solution as well, we can really add some value and improve our credibility!

And of course no article in this newsletter would be complete without a reference to the Internet! A recent development in the Catalyst Process enables users to complete their input through a website that can be independent or linked through a live customer facing website. This looks like a very attractive way to get feedback from customers about the usability and value of e-business applications. Watch this space! ■

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Measuring users’ perception of your service and the value you deliver... is not easy!

Improving it is *!#!* difficult!

But now there is a process that can really improve your service. And it’s been used successfully by UK blue chip organisations to:

- clarify user problems in a way that makes them easy to address
- pinpoint the priorities of each user segment
- identify and bridge the key user / IS group perception gaps

If you’d like to explore this innovative approach to improving users’ perception of your service without any commitment, contact:

Charles Hobson on 0850-743526 or email fc.hobson@virginnet.co.uk

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Catalyst... helping you to bridge the gap



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— SERVICE TALK —

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