



COMMON MEASUREMENTS TOOL

CMT User Manual

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HOW TO USE THIS MANUAL

The Common Measurements Tool (CMT) User Manual is written for project managers who are responsible for undertaking a client survey using the Common Measurements Tool. It assumes a basic familiarity with service improvement and with survey research, focusing on specific issues related to using the CMT.

The ICCS has made several complementary publications available through its website, www.iccs-isac.org:

How-to Guide to Service Improvement Initiatives. Any client survey should be part of a larger service improvement strategy. A client survey should be developed based on the objectives of that strategy and the service improvement goals the organization is trying to achieve. Originally published by the Government of Canada, this how-to guide takes a step-by-step approach to planning, implementing, and assessing a service improvement initiative, and includes specific reference to the Common Measurements Tool.

How to Conduct Customer Surveys. The survey questionnaire is only one small part of the survey research process. Published in co-operation with the Government of Ontario and the Government of Quebec, this how-to guide details the survey research process from defining objectives to determining sample sizes to interpreting data. It also includes specific reference to the Common Measurements Tool.

Section 1 of the CMT User Manual provides you with some background on the CMT. Section 2 is designed to help you get started, describing the different types of questions offered and how to begin selecting questions for your survey. Recognizing that challenges can arise as you construct your survey, Section 3 answers questions that other CMT users have asked. For those who wish to track the experience of their clients as they move from one service delivery channel to another, or from one contact to another, Section 4 offers a template for administering a multi-contact survey. Finally, it is our experience that the most helpful support we can provide is a sample survey so you can see what your survey might look like when it is finished. Sections 5 and 6 present sample CMT surveys.

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1. INTRODUCTION

In an environment of fiscal restraint, public service organizations depend more and more on feedback from their customers to make effective and sound decisions about their services. Decision-making is only as accurate and reliable as the information upon which it is based.

The Common Measurements Tool (CMT) is an easy-to-use survey framework designed to help public-sector managers undertake client satisfaction surveys and to facilitate benchmarking across jurisdictions. Using the CMT, public-sector managers are able to understand client expectations, assess levels of satisfaction, and identify priorities for improvement. By using the questions set out in the CMT, jurisdictions can also compare their results against peer organizations, identifying best practices, sharing lessons learned, and participating in a community of organizations dedicated to service excellence.

In short, the CMT is:

- **A Consistent Set of Questions:** The CMT consists of a bank of carefully constructed questions that apply to service delivery across a wide spectrum of public sector service and products. It can be used with both internal and external clients.
- **A Tool that can be Customized:** Individual organizations can adapt the CMT to their own situations in two ways: a) by selecting relevant questions from the question bank, and b) by creating custom questions where these are required. Therefore, organizations can get the benefits of benchmarking CMT questions without giving up the ability to track questions of special interest to their business.
- **Focused on Improving Service Delivery:** Service quality systems often stop at the report card stage, providing measures of current performance but not the directional information that is necessary to guide service improvements. The CMT provides report card-like measures as well as information to guide service improvement.
- **A Basis for Benchmarking Service Quality:** Observing the performance of other organizations can be a great catalyst. The Institute for Citizen-Centred Service (ICCS) maintains a confidential database of CMT research results, and reports benchmarks for numerous types of public sector organizations. In addition to benchmarking externally with other organizations the CMT can play a valuable role internally in helping an organization to track its own progress over time.

1.1 BUILDING A CMT COMMUNITY

In order to provide quality service, it is important for organizations to have clear, meaningful input from their clients. There are many different ways of gathering this information and it is common for organizations to design tools for specific client input exercises. Unfortunately, many of the tools used have not been as well designed as they might be. Furthermore, by using different tools, it has not been possible for organizations to compare results with peers.

The CMT is a direct response to these problems. First developed in 1998 by an inter-jurisdictional group of Canadian public servants working through the Canadian Centre for Management Development (CCMD), the CMT provides a consistent set of questions and response scales that address five key elements underlying all service interactions: client expectations, client perceptions of the quality of the service experience, client satisfaction levels, client-defined levels of importance, and identifiable priorities for service improvement. By addressing each of these elements, the CMT makes it possible for organizations to learn not only what components of service are less than satisfactory to their clients and to what degree, but also to gather information that can help determine the best course of action (For more about the five elements of service delivery see Appendix A).

The value of the CMT was clear from the beginning as users from across Canada and elsewhere adopted the tool for use in their service improvement strategies. For example, the Government of Canada declared that client feedback and satisfaction measures used by departments and agencies must be consistent with the CMT methodology in order to enable comparison across the public service. Similarly, the Government of Ontario directed ministries to use the CMT as part of their Service Quality Initiative.

Since being recognized by the Commonwealth Association for Public Administration and Management (CAPAM) with a Silver Award for International Innovation and by the Institute of Public Administration of Canada with a Gold Award for Innovative Management, more and more organizations have adopted the CMT, and its value will only grow.

1.2 VERSION 2.0: ENHANCING THE CMT

Since its inception, one of the goals of the CMT has been to keep it consistent over time so as to ensure reliable benchmarking. The bank of questions and the measurement scales recommended in the CMT have proved to be a solid foundation for dozens of public-sector organizations who have used the CMT in designing their client surveys. However, it is also recognized that periodically the CMT needs to be updated to reflect the changing service environment.

Whereas the original CMT questions focused on in-person or over-the-counter service delivery, recent research from *Citizens First 3* (available at www.iccs-isac.org) highlights the degree to which citizens use a variety of service channels (telephone, Internet, mail, kiosk) when accessing government services. To continue serving public-sector managers, the questions available in the CMT needed to reflect this evolving service environment.

Citizens First 3 also demonstrated that the drivers of satisfaction vary between service channels. For example, while the knowledge/competence of service staff is critical in an over-the-counter service environment, factors such as navigability are more important when accessing services over the Internet. This reality needed to be reflected in the Core Questions of the CMT (for more on the Core Questions see Chapter 2.2: The Core Questions).

Anticipating these changes, the CMT Standards Board (an inter-jurisdictional body of public servants from across Canada tasked with overseeing the use and development of the CMT), undertook a formal review of the CMT in 2001. Through extensive user interviews and a thorough literature review, additional enhancements were recommended, including:

- New questions addressing satisfaction with electronic and telephone service delivery
- Core Questions reflecting the specific drivers of satisfaction for each service delivery channel
- Adoption of an “agreement” scale (in place of a “satisfaction” scale) to enhance usability
- Language that is consistent in both French and English.

Taking the results of this review along with the findings of *Citizens First 3*, the Institute for Citizen-Centred Service set out to deliver a single, integrated, multi-channel survey instrument.

Is the CMT going to change again? While it is important that the CMT remain flexible enough to respond to the changing service environment, the ICCS also recognizes that it is essential for the CMT to change within a predictable and controlled framework. To this end, an official Change Protocol has been drafted to ensure that the CMT is reviewed at regular three-year intervals but that it is not subject to ad hoc changes. The CMT Change Protocol is available at the ICCS web site (www.iccs-isac.org).

2. HOW TO GET STARTED

2.1 INTRODUCTION

As mentioned above, the survey questionnaire is just one part of the survey research process. Once you have established your research objectives, identified your sample population, settled on a data collection method, and completed all the other preliminary steps in undertaking a client survey, it is time to design your questionnaire.

Client satisfaction surveys generally contain two types of measures:

1. **Satisfaction measures:** One or several summary measures such as “How satisfied were you with the overall quality of service delivery?” or “How did the service you got compare to what you expected?”
2. **Explanatory and diagnostic measures:** These questions form the large majority of items in the survey. They address all aspects of the client’s experience getting the service – access, the staff involved, how long it took, what the outcome was, and so on.

The satisfaction measures generally show that some clients are happy with the service they got while others are not. The explanatory measures will reveal why the satisfied clients are satisfied, and what went wrong for those who were dissatisfied.

The CMT contains a large number of questions that can be used as explanatory measures. The questions best suited to your survey will depend on the objectives you established for your survey. As one guide, however, the ICCS has identified a set of “core” questions that should be incorporated whenever possible. In addition to facilitating the benchmarking process, the core questions were selected because of their relationship to the “drivers of satisfaction” – those elements of the service experience which, when present, ensure high levels of satisfaction.

The *Citizens First* research, available from www.iccs-isac.org presents a full discussion of the drivers of satisfaction.

Note: The set of explanatory measures will likely include demographic variables such as age, gender, and region. It is important to check whether demographic groups differ in their perceptions of your organization’s services. Chances are that such differences will be small, because most public sector services are designed to accommodate all citizens, unlike private sector products and services that are often designed and marketed to appeal to specific demographic subgroups.

2.2 CHOOSE CORE QUESTIONS

Step 1: Choose the Core Questions that Best Meet Your Research Objectives

The CMT defines Core Questions for each service delivery channel and encourages all organizations to include them in surveys (see Table 1).

The core questions are “core” partly because they are central to any investigation of client satisfaction. Each core question is designed to explore one of the “drivers of satisfaction” – those elements or attributes of the service experience which, when present, ensure high levels of satisfaction. Further, each driver of satisfaction is reflected in at least one of the core questions.

Since the core questions are directly related to the drivers of satisfaction, the ICCS strongly recommends their use in all client surveys.

The second function of the core questions is to facilitate benchmarking. This function demands that surveys use the questions exactly as they are stated in the CMT. Standard wording of questions and standard response formats are necessary for the accurate comparison of results over time and across jurisdictions.

One adjustment to wording is permitted: you may specify the product or service that the survey addresses, for example:

- *How satisfied were you with the overall quality of CCRA’s service delivery?*

Or

- *I was informed of everything I had to do to renew my driver’s licence*

It is important to note that the core questions differ slightly across service delivery channels – telephone, Internet, over-the-counter services and so on. A typical survey will incorporate eight or ten core questions appropriate to the service delivery channel. Since a complete survey would likely have anywhere from 30 to 60 questions, the core questions form a relatively small but essential part of the questionnaire.

For easy reference, Table 1 lists the core questions for each service delivery channel. The questions also appear in the CMT question bank (available at www.iccs-isac.org), where they are highlighted for easy identification.

Table 1. CMT Core Questions

Drivers and outcome measures	Question	Service delivery channel				
		Telephone	In-person	Web	Mail	Email
SATISFACTION						
Timeliness	Overall, how satisfied were you with the amount of time it took to get the service?	√	√	√	√	√
Accessibility	Overall, how satisfied were you with the accessibility of the service/product?	√	√	√	√	√
Overall satisfaction	How satisfied were you with the overall quality of service delivery?	√	√	√	√	√
PERFORMANCE						
Fairness	I was treated fairly	√	√	√	√	√
Information	I was informed of everything I had to do to get the service/product	√	√	√	√	√
Extra Mile	Staff went the extra mile to make sure I got what I needed	√	√	*		√
Competence	Staff were knowledgeable and competent	√	√	*		√
Accessibility	I was able to get through to an agent without difficulty	√		*		√
Waiting time	I waited a reasonable amount of time at the service location		√			
Navigation	It was easy to find what I was looking for			√		
Appeal	The site is visually appealing			√		
Information	The site had the information I needed			√		
Privacy	I feel confident that my privacy is fully protected on this site (OR: when I communicate by email with [agency].)			√		√
OUTCOME						
Outcome	In the end, did you get what you needed?	√	√	√	√	√

* Questions about service staff will not be relevant in many surveys of Internet services, however they may be relevant when the service involves new technologies such as Voice over Internet Protocol.

2.3 SELECT OTHER CMT QUESTIONS

Step 2: Supplement the Core Questions with Other CMT Questions Relevant to Your Research Objectives

Questions in the CMT appear in ten content areas. You can select relevant questions from any section and should not feel bound by the order of the questions.

- I Service/product delivery
- II Service standards
- III Access and facilities
- IV Communication
- V Cost
- VI General questions
- VII Overall evaluation
- VIII Information about you (For External Clients)
- IX Information about you and your organization (For Internal Clients)
- X Comments

When choosing additional questions, be very selective. There are far more questions in the CMT than will appear in any finished survey. **No actual survey will use all of the questions in the CMT!** In fact, no section should be imported in its entirety, since each section contains alternative and optional questions. (The one exception to this rule is Section VII, “Overall evaluation”. It has just three questions and they form a good package.)

The CMT often presents alternative ways of approaching an issue. For example, Questions 3, 4 and 5 in Section I – Service/Product Delivery ask, in different ways, how frequently respondents use the service.

When constructing a survey, you would choose *one* of these questions (or none, if frequency of use is not of interest). Don’t cover the same ground twice – respondents are quick to sense that you are wasting their time.

2.4 DESIGN AND ADD CUSTOM QUESTIONS

Step 3: Design and Add Custom Questions to Meet Research Objectives That Cannot be Met Using CMT Questions

The CMT addresses widely shared elements of service delivery, but it does not contain the specific content that distinguishes satisfaction with transportation from tax advice or campgrounds. Therefore, you will no doubt wish to add your own custom questions – and you are encouraged to do so. One advantage of this flexibility is that it allows you to add questions from surveys you have used in the past so that you can make a smooth transition to using the CMT.

Phrase custom questions carefully, and *always* pre-test them with your staff and/or with clients. An apparently straightforward question can be interpreted in entirely unanticipated ways.

Custom questions can be inserted at any point in your questionnaire. The key is to make the entire survey flow effectively so that respondents provide the information you need.

2.5 FINALIZE YOUR QUESTIONNAIRE

Just as there were many steps that you had to take before drafting your questionnaire, there are now many steps to take as you finalize and field your survey, and analyze the data. The *How-To Conduct Customer Surveys* guide is an excellent resource if you need guidance in undertaking these steps.

Returning to your questionnaire, the next section of this Manual is designed to help you finalize your questionnaire, providing advice and guidance based on the experience of those who have already implemented the CMT.

3. FREQUENTLY ASKED QUESTIONS

3.1 CAN WE DO THE RESEARCH INTERNALLY?

Few service delivery organizations have the built-in capacity to conduct survey research on their own. The CMT is not recommended as a do-it-yourself project unless your organization already has a solid background in research design and statistical analysis, and is able to devote the time and other resources required to mount a considerable project.

Provincial, territorial, municipal and federal organizations have found that success with the CMT is much more certain when they have expert assistance, either from trained researchers within their own organization or from outside research consultants.

Engaging expert assistance at the outset will get the project off to a quick start and will avoid costly mistakes.

3.2 CAN I CHANGE THE WORDING OF QUESTIONS?

Consistent wording of questions is necessary if results are to be comparable across organizations. There can be no benchmarking if wordings differ. Having stated this, the answer to the question is both yes and no:

- The Core Questions shown in Table 1 of the CMT are those which are most critical to benchmarking. **Do not change the wording of Core Questions** (see Section 2.2 for more detail).
- Questions other than the Core Questions can be modified, but bear in mind that if they are changed significantly, you will be unable to compare your results to those of other organizations.
- Some questions need to be changed. If the CMT lists response options that are not relevant to your customers, you should delete or change them. (For example, a survey of a telephone service would delete response options that applied only to websites).
- Many CMT questions refer to “the service you received”. You can always change this to, “the information you received” or to, “the product you received”, or to a specific designation such as “the building permit”. You can do this with Core Questions as well.

The ICCS maintains a CMT Benchmarking Database (see section 3.14) through which you can anonymously compare your results against those of peer organizations. If you change the wording of questions significantly, however, the ICCS will not be able to add your data to the database. Please consult with the ICCS at info@iccs-isac.org if you have any questions.

3.3 CAN I ADD AN INTRODUCTION?

While the items in the question bank should be left alone to the extent that this is possible, there is no restriction on how you introduce the survey. An introduction will typically:

- Inform the respondent of the purpose of the survey;
- Motivate the respondent to participate;
- Inform how much time the survey will take;
- State that all responses are confidential and anonymous.

In a telephone survey, the introduction may also be used to schedule a convenient time to do the survey.

It may be important, as well, to write brief introductions to individual sections within the survey, so that the respondent knows exactly what the following questions refer to. The CMT does not suggest how to do this, as the messages will vary from one service to another.

3.4 CAN I CHANGE THE ORDER OF QUESTIONS?

The order of questions in the CMT is appropriate for many purposes, but you may make adjustments. For example, most sections of the CMT have both “contextual questions” with multiple choice response options and “scaled questions” where responses are on 1-to-5 scales. It may simplify the organization of the survey if all the scaled questions are grouped in one or two locations. Also, many surveys place the “Overall Evaluation” questions, Section VII, near the beginning rather than at the end.

You should always feel free to add your own customized questions to the survey at any point that is appropriate.

3.5 CAN I JUST USE THE CORE QUESTIONS?

Yes, you can. You will have a two- or three-minute mini-survey that is suitable for comment cards or for administration by your own staff at points of client contact.

If you are conducting a formal survey where clients are sampled in a systematic manner, you may want to go beyond the Core Questions. It takes a certain amount of time and money to engage a respondent. You will want to maximize this investment by developing a survey that gives you the best chance to identify opportunities for service improvement.

3.6 SHOULD I INCLUDE OPEN-ENDED QUESTIONS?

The CMT provides a space in each section for respondents’ verbal comments. While open-ended comments can be valuable, they are more difficult to analyze than multiple choice questions. Use open-ended questions in moderation. Do not feel compelled to put an open-ended question in every section of your survey!

Two good uses for open-ended questions are:

1. To clarify issues that are not well understood or well-defined
2. To hear the story in a client’s own words.

3.7 CAN I CHANGE THE RESPONSE SCALES?

Response scales should not be changed. Changing them will rule out any prospect of benchmarking. Altering the labels or dropping down to a 4-option response metric can cause serious problems when it comes time to analyze the data.

The best way to present a 5-point response scale is to **label the end-points only**, e.g. 1 is labeled “Very dissatisfied” and 5 is labeled “Very satisfied”. The reason is that the points on a scale are meant to be equal distances apart. If the differences between points are not equal, then one is not justified in doing statistical analyses that demand they be equal – such as calculating a mean score or doing an analysis of variance. While the integers 1 through 5 are equally spaced, it is more difficult to know whether the distance between “Strongly Agree” and “Agree” is the same as the distance between “Agree” and “Neither Agree nor Disagree.” The published version of the CMT labels end-points only.

If your situation requires you to give each point on a response scale a verbal label, the ICCS provides the guide below as recommended labels. [Note: Labeling each point on the importance scale is not recommended, as there is no set of terms that conveys five equal gradations of importance.]

Scale	English	French
Satisfaction	5. Very satisfied 4. Satisfied 3. Neither satisfied nor dissatisfied 2. Dissatisfied 1. Very dissatisfied	5. Très satisfait 4. Satisfait 3. Ni satisfait ni insatisfait 2. Insatisfait 1. Très insatisfait
Agreement	5. Strongly agree 4. Agree 3. Neither agree nor disagree 2. Disagree 1. Strongly disagree	5. Tout à fait en accord 4. D’accord 3. Ni d’accord, ni en désaccord 2. En désaccord 1. Tout à fait en désaccord

3.8 DO I NEED BOTH IMPORTANCE AND PERFORMANCE MEASURES?

Several sections of the CMT present items with two paired response scales, one measuring how well the service was delivered (performance) and the other measuring how important that aspect of service is to the client (importance). The purpose of these questions is to pinpoint the elements of your service delivery process that will lead to the greatest improvements in client satisfaction. A careful analysis of client responses will identify what changes to the service delivery process will produce the biggest payoffs in client satisfaction.

There are two approaches to this task. One uses just the performance measure while the other uses both the performance and the importance scales.

Performance scale only

- You can determine the “drivers” of satisfaction with just performance scales. The drivers are the performance measures that contribute most strongly to client satisfaction. The statistical procedures most commonly used in this analysis are multiple regression and structural equation modeling. *Citizens First* takes this approach.

Performance and importance scales together

- Using the paired scales provides an additional source of information, but it also lengthens the survey.
- It allows calculation of the gaps (differences) between importance and performance. The “opportunity matrix” is a plot of these differences (See page 41 of *How to Conduct Customer Surveys*).
- You should also examine the correlations between importance and performance. High positive correlations are good – a high correlation would indicate, for example, that people who find timely delivery important are getting timely delivery.

3.9 HOW CAN I ASSESS SERVICE WHEN MULTIPLE DELIVERY CHANNELS ARE USED?

Public sector services are increasingly multi-channel. A client phones before visiting an office, or downloads a form from the Internet and mails it in. At least half of all service experiences involve the use of two or more channels.

The CMT addresses multiple service delivery channels in two ways:

1. It contains questions that are specific to each service delivery channel.
2. It defines a simple method for following clients through the multiple contacts and channels that they experience in getting a service. Section 5 outlines the method and Section 6 presents a detailed example survey that illustrates the procedure.

Assessing clients' multi-channel behaviour answers questions that are critical for channel management, for example:

- What channels are customers using?
- What are the typical sequences of contact?
- How well or poorly is each separate channel working?
- How does each channel contribute to the customer's overall satisfaction?

3.10 WHAT IS THE RIGHT LENGTH FOR A SURVEY?

A survey is the right length when it provides the information you need without being burdensome to the respondent.

An effective survey can be as short as 5 or 6 questions, although, as mentioned earlier, the time and money that it takes to find a respondent often makes it cost-effective to design a more far-reaching survey.

Ten to fifteen minutes is a comfortable length for most clients.

It is good practice to inform the respondent – honestly – how long the survey will take.

Test the length of the survey by having people do it. The number of questions is not a very accurate guide, as some question formats go more quickly than others.

Consult *How to Conduct Customer Surveys*, available through the ICCS web site, for an expanded discussion of this issue.

3.11 CAN I USE CMT QUESTIONS ON THE TELEPHONE?

Service quality surveys can be administered by telephone, paper-and-pencil questionnaires, over the Internet, and various other ways. The language and techniques differ somewhat according to the channel used.

The CMT comes in two versions:

1. Written language version: for Internet and pencil-and-paper administration
2. Spoken language version: for telephone and in-person administration

The versions are very similar. For the most part the actual survey questions are identical, while the instructions and introduction of questions are adapted to the channel of administration.

3.12 HOW BIG A SAMPLE DO I NEED?

This is a complex question for which there is no rule-of-thumb answer. *How to Conduct Customer Surveys*, available from the ICCS web site, contains a comprehensive overview of the topic.

Major elements in the decision include:

- **Required precision of measurement:** Measurement that is accurate within 3 points out of 100 requires a larger sample than measurement that is accurate within 10 points.
- **Number of sub-groups within the sample:** If reliable results are required for every province and territory, the sample will be much larger than if only a national result is required.
- **Time and money available:** Practical constraints may impose a ceiling on the research design.

A qualified research consultant can readily establish the sample size that your project requires.

3.13 NOW THAT I HAVE MY SURVEY, WHAT DO I DO?

Constructing a survey is generally one of the middle steps in client satisfaction research. If you have reached the survey design stage, you should already have a budget, a timetable, detailed objectives, and a sampling design. Don't put too much energy into survey design until the overall framework for the project is in place. The *How-to Guide to Service Improvement Initiatives* is an excellent resource for understanding how a survey fits into a larger service improvement initiative while *How to Conduct Customer Surveys* describes the steps in the research project in a logical sequence. Both are available through the ICCS website at www.iccs-isac.org

3.14 HOW DO I BENCHMARK MY RESULTS AGAINST OTHERS?

The ICCS provides a benchmarking service that all public sector organizations can use. Simply submit your results to ICCS and it can provide you with results obtained by other comparable organizations. The process is confidential – each participating organization is identified to others only by the type of service that it provides such as taxation, public works, etc. Visit the ICCS website, www.iccs-isac.org for current information.

3.15 HOW DO I COMPARE MY ORIGINAL CMT RESULTS WITH VERSION 2?

The two versions of the CMT have been compared in a split-sample test where 1,000 respondents received the new version and 400 received the old version. The test included all the core questions plus some others, and showed no systematic differences between versions of the CMT. There is, therefore, no evidence to date that the revisions implemented in version 2 will affect comparisons of results. ICCS will continue to monitor data obtained using the two versions and advise clients if any significant differences are found. For more information about the comparability of results between versions of the CMT, please contact the ICCS at info@iccs-isac.org.

3.16 HOW CAN THE INSTITUTE FOR CITIZEN-CENTRED SERVICE HELP WITH MY SURVEY?

The ICCS plays a central role in supporting the CMT and making it available to public-sector organizations. It is also responsible for the design and management of the CMT Benchmarking Database. As the ICCS consists of only a small group of dedicated staff, it is not able to offer consulting services to individuals or organizations undertaking CMT surveys. If you have need of such advice, the ICCS can help direct you to external resources.

4. A TECHNIQUE FOR MULTIPLE CHANNELS AND MULTIPLE CONTACTS

As discussed in Section 3.9, public sector services are increasingly multi-channel. A client phones before visiting an office, or downloads a form from the Internet and mails it in. At least half of all service experiences involve the use of two or more channels. To fully understand the experience of your clients when using multiple contacts, it is important to explore each contact the client makes. This section illustrates a technique for investigating multiple-contact services. It works equally well for multiple contacts within the same channel, or across different channels (e.g. telephone, Internet, counter service. See Section 6, Example B for a sample questionnaire that uses this technique.

- 1.** How did you **first** make contact with [agency] to get this service?

Telephone Office Website Email Regular mail Fax Kiosk

- 2.** Did you talk to [agency] staff at this time? If so, please indicate how much you agree with these statements about the staff.

STATEMENT	AGREEMENT				
	Strongly disagree				Strongly agree
I was able to get through to an agent without difficulty	1	2	3	4	5
Staff were knowledgeable and competent	1	2	3	4	5
I was treated fairly	1	2	3	4	5
Staff went the extra mile to make sure I got what I needed	1	2	3	4	5

- 3.** What was the result of this contact?

- I got the service/product I needed
- I was referred on to another contact within the same government agency
- I was referred on to a different agency or government
- I reached a dead end and had to start over with another agency
- I was told that the service was not available, or that I was not eligible
- I gave up, or decided that I did not want the service

- 4.** How satisfied were you with the service delivery process at this point?

Very dissatisfied

1

2

3

4

5

Very satisfied

The four questions in the preceding box inquire about the respondent's first contact with the service agency. The four-question sequence is then repeated for each successive contact with the agency. In a telephone or Internet survey, the questions can be tailored to the service delivery channel – a telephone contact evokes a different set of questions than a visit to an office location. In question 3, you may wish to specify outcome options that are specific to your agency's services.

This sequential data provides a very rich analysis of the service delivery process. It can identify processes that work well and poorly, and it will pinpoint areas where clients experience difficulty. It will be most valuable if your sample includes clients who failed in their attempt to get service as well as those who were successful.

5. EXAMPLE A: A WRITTEN SURVEY

AN INTERNET OR PENCIL-AND-PAPER SURVEY

The following sample survey shows what a CMT questionnaire might look like. Any actual survey will be different, as it will reflect the objectives and context of a particular organization. It may include non-CMT questions that address your organization's specific services and information needs, or that replicate questions that were used in previous surveys. Your questionnaire will also include the name of your organization and services where appropriate.

After a brief introductory page stating the purpose of the survey and stressing confidentiality, the questions begin. The shaded boxes illustrate how the survey might be divided into six browser pages.

1. Check each of the services/products that you received from [agency] **in the past year.**

- 1. *Name of service*
- 2. *Name of service*
- 3. *Name of service*
- 4. *Name of service*
- 5. *Name of service*

2. Which service/product did you receive **most recently?** Type its number here:

Service number _____

Please answer the remaining questions in the survey with regard to this service – the most recent service you received from [agency].

3. When did you last use this service?

- Within the past week
- Within the past month
- Within the past 3 months
- Within the past year

SUMMARY QUESTIONS

	Very dissatisfied			Very satisfied	
9. Overall, how satisfied were you with the amount of time it took to get the service?	1	2	3	4	5
10. Overall, how satisfied were you with the accessibility of the service/product?	1	2	3	4	5
11. How satisfied were you with the overall quality of service/product delivery?	1	2	3	4	5

ABOUT YOU

12. Gender

- Female
 Male

13. Age

- 18-24 yrs
 25-34 yrs
 35-49 yrs
 50-64 yrs
 65+ yrs

14. How would you describe your computer skills?

- I don't use a computer
 Beginner
 Intermediate
 Advanced
 Expert

15. In what size of community do you live?

- City of 1,000,000 or more
 City of 100,00 to 1,000,000
 City or town 10,000 to 100,000
 Town 1,000 to 10,000
 Town under 1,000 or rural

Thank you for participating!

Your feedback helps us to improve our service.

6. EXAMPLE B: A SPOKEN SURVEY

A TELEPHONE SURVEY THAT USING MULTIPLE-CHANNEL, MULTIPLE-CONTACT TECHNIQUE

This example illustrates the multiple-contact technique outlined in Section 5. In this example, the client has applied for a new passport. She first visited the web site and downloaded an application form, then took it to the Passport Office. There she was told that her photo was unacceptable: the background was gray instead of white. This necessitated a second visit to the Passport Office, where her revised application was accepted. A week later she received her new passport in the mail.

From the client's perspective, this process had its good points and its frustrations. The multiple-contact technique allows separating these components of the process. The respondent's answers to questions are indicated in order to illustrate the flow.

The shaded areas in the following pages highlight questions that are within the multiple-contact sequences.

After a brief introduction stating the purpose of the survey and stressing confidentiality, the questions begin:

1. When did you last use the passport service?
 - Within the past week
 - Within the past month
 - Within the past 3 months
 - Within the past year

2. Were you renewing a passport, or was this your first application for one?
 - Renewal
 - First application

The second pass through the loop captures the client's first visit to the passport office, when she is told that her photo does not meet requirements. The "office" response to Question 1 branches to a set of questions about office services.

1. How did you **next** make contact with the Passport Office? *(Prompt with response options only if necessary.)*

- Telephone Office Website Email Regular mail Fax Kiosk
-

2. I would like to read some statements about your experience in the Passport Office. Please tell me the extent to which you agree with each statement, where 1 means "Strongly disagree" and 5 means "Strongly agree".

STATEMENT	AGREEMENT					NA
	Strongly disagree				Strongly agree	
I waited a reasonable amount of time at the service location	1	2	3	4	5	NA
Staff were knowledgeable and competent	1	2	3	4	5	NA
I was informed of everything I had to do to get the service	1	2	3	4	5	NA
I was treated fairly	1	2	3	4	5	NA
Staff went the extra mile to make sure I got what I needed	1	2	3	4	5	NA

3. What was the result of this contact? *Code response: prompt with options if necessary.*

Staff approved your application

Your application was rejected because:

Guarantor was not eligible

Insufficient documentation (birth certificate, driver's license etc)

Photo improperly printed

4. How satisfied were you with the service delivery process at this point?

Very dissatisfied

1

2

3

4

Very satisfied

5

The third pass through the question sequence describes the client’s next visit to the Passport Office, when her passport photo now meets requirements.

1. How did you **next** make contact with the Passport Office? *(Prompt with response options only if necessary.)*

- Telephone Office Website Email Regular mail Fax Kiosk
-

2. I would like to read some statements about your experience in the Passport Office. Please tell me the extent to which you agree with each statement, where 1 means “Strongly disagree” and 5 means “Strongly agree”.

STATEMENT	AGREEMENT					NA
	Strongly disagree				Strongly agree	
I waited a reasonable amount of time at the service location	1	2	3	4	5	NA
Staff were knowledgeable and competent	1	2	3	4	5	NA
I was informed of everything I had to do to get the service	1	2	3	4	5	NA
I was treated fairly	1	2	3	4	5	NA
Staff went the extra mile to make sure I got what I needed	1	2	3	4	5	NA

3. What was the result of this contact? *Code response: prompt with options if necessary.*

Staff approved your application

Your application was rejected because:

Guarantor was not eligible

Insufficient documentation (birth certificate, driver’s license etc)

Photo improperly printed

4. How satisfied were you with the service delivery process at this point?

Very dissatisfied

1

2

3

4

Very satisfied

5

The final pass through the question sequence describes the receipt of the renewed passport in the mail.

1. Did you have any further contact with the Passport Office? (Prompt with response options only if necessary.)

Telephone	Office	Website	Email	Regular mail	Fax	Kiosk
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

2. What was the result of this contact? *Code response: prompt with options if necessary.*
√ You received your passport
___ Other: Please describe what happened: _____

3. How satisfied were you with the service delivery process at this point?

Very dissatisfied							Very satisfied
1	2	3	4	5			

The multiple-contact sequence is now completed. Two further questions ask about the total length of time the renewal process took.

1. How long did it take to get your new passport – from the time you first contacted the Passport Office until your passport arrived?

1 week	2 weeks	3 weeks	4 weeks	5 weeks	6 weeks	7 or more
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2. What is an acceptable amount of time for this process to take?

1 week	2 weeks	3 weeks	4 weeks	5 weeks	6 weeks	7 or more
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Summary questions are next, capturing the client’s overall assessment of the experience.

1. When you approached the Passport Office for this service, what quality of service did you expect? Use a scale where, where 1 means “Very poor service” and 5 means “Very good service”.

Very poor service					Very good service
1	2	3	4	5	

2. Looking back, how did the service you got from the Passport Office compare to what you expected? Use a scale where, where 1 means “Much worse than I expected” and 5 means “Much better than I expected”.

Much worse than I expected					Much better than I expected
1	2	3	4	5	

3. In the end, did you get what you needed?

- Yes
- No
- I got part of what I needed

Finally I would like to ask about your overall satisfaction with the Passport Office – 1 means “Very dissatisfied” and 5 means “Very satisfied”.

	Very dissatisfied				Very satisfied
4. Overall, how satisfied were you with the amount of time it took to get the service?	1	2	3	4	5
5. Overall, how satisfied were you with the accessibility of the service/product?	1	2	3	4	5
6. How satisfied were you with the overall quality of service/product delivery?	1	2	3	4	5

An open-ended question provides opportunity for the client to register any topic not yet addressed

1. Would you like to make any additional comments or suggestions about passport renewal?

Relevant demographic questions (age, region, etc.) complete the survey.

End by thanking the respondent for participating.

APPENDIX: THE CMT SERVICE MODEL

In order to develop common measures for the CMT, it was important first to identify the primary elements underlying all service interactions and the impact these factors have on client satisfaction. According to this conceptual model (Figure 1), the internal and external variables of a service interaction that should be measured are:

1. Client expectations
2. Client perceptions of the quality of the service experience
3. Client-defined levels of importance
4. Client satisfaction levels
5. Identifiable priorities for service improvement

The CMT includes questions specifically designed to help public-sector organizations address each of these elements.

2.1 CLIENT EXPECTATIONS

When clients approach a service provider on either a voluntary or involuntary basis they do so with a variety of expectations that originate from many sources. A service gap is defined as the disparity between a client's expectations of a service and their perception of the quality of the service experience. It is logical to infer that the existence of a negative service gap (i.e., when expectations exceed actual service delivery levels) leads to a less than satisfactory service experience. Conversely, when expectations are lower than the level of service delivery, a satisfactory service experience is realized. However, within the public sector, even positive gaps (situations where service expectations are exceeded) may be problematic. Citizens may see positive gaps as a misuse of public resources. The challenge for the public sector is significant, and understanding the client expectations at the onset of the service experience is crucial to addressing service satisfaction.

Four key factors affecting a customer's (client's) expectations that are important for an organization to consider in relation to service quality are word of mouth, personal needs, past experience, and external communications by the service provider.¹ For example, recent work on the creation and communication of service standards by many public organizations will likely

¹ Zeithaml's model of Customer Assessment of Service Quality

influence expectations to a great degree. A thorough understanding of the expectations that clients bring to the service experience will provide an organization with vital information to plan for either managing expectations or targeting areas of improvement.

2.2 CLIENT PERCEPTIONS OF THE QUALITY OF THE SERVICE EXPERIENCE

It is important for the service provider to understand client perceptions of the experience in order to identify potential areas of improvement. For example, the client views the service staff as being unhelpful because they redirect them to another counter. The service staff perceive this same response as helpful since the client has been redirected to the appropriate service personnel. On one level, the problem in this situation is a difference in perception of the same service experience. On another level, the problem may be with the actual service delivery. By identifying client perceptions, the problem may be addressed by the service agency. The organization may choose to clarify points of contact through communications or they may redesign their service delivery process to decrease the number of contacts required by the client in order to receive the service needed.

The disparity between client expectations and the perceived experience will result in a service gap.² Service gaps are directly related to the level of satisfaction experienced by a client.

2.3 CLIENT-DEFINED LEVEL OF IMPORTANCE

The perceived importance of a service (or its elements) is an essential service variable on two levels: as an antecedent of satisfaction and for planning purposes. As an antecedent of satisfaction, the client brings the level of importance to the service experience. As the client experiences service delivery, his or her perceptions of the experience are filtered by levels of importance that ultimately result in a level of satisfaction. Frequency of use is also considered to be a factor that influences the level of importance. The following example may illustrate this logic.

A client visits a hospital to have a minor procedure conducted. The experience is perceived as negative by the client due to the following factors: excessive wait time, cold impersonal staff, numerous forms to fill out that are redundant and confusing, and a medical procedure which, by nature, is unpleasant. The client will never have to use this service again and sees this experience as negative but unimportant. The satisfaction level is rated as “poor” and the client is relieved the experience will never need to be repeated. Conversely, a client is rushed to the hospital with an unexpected medical problem and finds all of the above variables to be the same except that the

² Zeithaml et al.

level of importance and frequency differ. The client's condition is serious and time is of the essence. The client, after having this negative experience, is informed that s/he will require a similar procedure at the same facility every six months for the rest of her/his life. The client rates the satisfaction level as "extremely poor" and s/he dreads the prospect of reusing the service.

Service variables recognized by the client in this example (timeliness, service staff interactions, and communication) were perceived as negative, but the level of importance can be isolated as specifically exacerbating the poor service satisfaction rating.

2.4 CLIENT SATISFACTION LEVELS

Clients react to a combination of their expectations: the importance of the service to them, and the actual service experience, resulting in an internalized response or perception. Satisfaction levels are a result of this perception and an internalized assessment process. Perception is an initial response and satisfaction is a judgment of that response in relation to one's needs.

2.5 IDENTIFIABLE PRIORITIES FOR IMPROVEMENT

Measurement of service quality must go beyond exploring satisfaction levels in order to be useful for planning purposes. Information on how important the overall service and individual service items are to the client will promote well-informed planning decisions. Cross-analysis of satisfaction and importance variables will identify priorities for improvements and thus promote efficient allocation of resources. However, frequently when clients are asked to stipulate levels of importance they indicate that all or most service elements are important which is unmanageable for planning purposes. By requesting that clients select the top three (approximately) service priorities, a manageable portfolio can be provided for planning purposes. A satisfaction/importance cross-analysis matrix is a tool that can be used in planning. Earlier models have provided similar cross-analysis tables using slightly different terminology; this model seems to parallel the terminology and emphasis of the service delivery model more closely.³

³ For information about the use of satisfaction/importance matrices, see How-To Conduct Customer Surveys, Chapter 4.