

Understanding Our Clients' Changing Needs

Introduction

As you know, the theme of our pre-conference this year is Transforming Parliamentary Libraries and Research Services to Meet Changing Clients' Needs. In this session I want to focus on what our customers need, how do we find this out, and why those needs will keep changing over time.

Our services exist to help and inform our customers (be they parliamentarians or the public) – that's why we're all here. Therefore, we really need to understand how we can best help our customers, so we can develop our services in a way that is aligned with their needs – and that stay aligned as those needs change.

My aim today is merely to provide an introduction to the topics to start a discussion amongst yourselves. I'll start by looking at some of the factors that are driving change. Then I'll briefly look at some of the ways we can find out what our customers really want from us. I'm probably not going to tell you anything you don't already know or haven't already tried. But, for each of you, your experiences will be different and by sharing those experiences we will be able to learn from each other and, maybe, take away something new that we can try when we return home. So, what I'm about to say is far less important than the discussions you have amongst yourselves afterwards!

Why are our clients' needs changing?

There are many, many answers to this question but I am going to consider some of the most significant that we have seen at Westminster. There may be others that are more important in your own institutions and I'd be really interested to hear about these afterwards.

1. Increasing demands on Members

This may well be stating the obvious, but Members' workloads have been increasing steadily over recent years. There is no shortage of legislation they need to consider, which is becoming increasingly more complex. The political & economic conditions can be challenging and change quickly. They have to respond to the demands made of them by their citizens, by their political parties, by journalists and by their government. Nothing is ever simple, and everything was needed yesterday. Whatever is asked of them, they are expected to deal with it and do it quickly. Expectations of them have just got greater and greater...

2. Higher expectations from citizens

Nowadays our citizens expect more of their representatives and of us, as a public service.

Members have to deal with a dizzying range of issues and problems, raised by citizens – all of which need to be answered. Citizens expect their representatives to be visible, to be open, to be available, to have considered views on local, national and international issues. As a citizen, it is quite easy now to compare notes on how your representative performs, compared to others – just as you might look on the web to compare hotels or car insurance.

And it's not just Members, as public engagement with Parliament has become increasingly important, particularly with the young, we too are compared and judged against other services that citizens use. If we want to preserve the reputation of our institution, then we need to keep up with the competition. And although we may not see Amazon, Apple, Facebook or Google as competitive rivals, our citizens expect our services to be as quick and easy to us as theirs and have similar functionality.

Which brings us on to our next driver...

3. Technology

Technology is driving change in all sorts of ways.

It enables things to be done faster, complex tasks to be carried out easily. The internet makes a wealth of information available instantaneously. As a result, the kind of enquiries we get from Members and the public are harder and more complex than they were 10-15 years ago. Reference enquiries are largely a thing of the past - the simple things they can do for themselves – that's what Google is for. So, what we're expected to do is more complex and more sophisticated – and we are reliant on technology to achieve this.

But all that information creates its own problems. What's true and what isn't? Which information is accurate, reliable, up-to-date? When I was writing this, I typed in 'UK GDP Growth 2019' into Google and I got 4.9 million results – 4.9 million – and my guess is not one of those results will accurately predict what UK growth will actually be in 2019! So, now we are expected to be the arbiters of what is 'good' information and what isn't.

Our customers are now equipped with a wide range of technology – different devices, email, social media, video channels, apps, all sorts – and we are expected to be able to provide them with answers across all that technology. Whether it is a computer, a tablet, a smartphone, or even a watch! So, we have to develop services that work across all those different channels and devices.

4. The world is getting smaller, changing faster, and everything happens in real time

The world has become a very small place, through TV and social media – something happens anywhere in the world and you can hear about it in minutes, if not seconds. Most issues now have

some form of international dimension. Globalization means you need to be aware of what is happening elsewhere as if it hasn't yet had an impact on you locally, the chances are that it soon will. Nowadays news is 24 x 7 – there is no downtime, no time to think. The days of only having to worry about the deadlines to make the 9 o'clock news on TV or when the national papers went to print overnight are long gone. Citizens want to know right now what their representatives think or are doing about something. Opinions come from all directions on social media and can go viral in moments – hashtags gain momentum quickly. Members are expected to be able to respond to events as they happen. So, we need to be able to brief them in real time and to be ready for almost anything.

How do we find out what our clients want?

Having looked at why our clients' needs are changing we now need to think about what those needs are and how do we go about finding out?

1. Ask them

Well, the most obvious answer is often the best!

In an ideal world, we would have the opportunity to have a face-to-face conversation with each of our customers to find out more about what they find useful or helpful. But life is not always ideal... Members are often very busy & may not have the time to spare to talk to us about their requirements. And, as for the public, well there are just too many of them to ask each and every one.

That's not to say that it's completely impossible to ask customers – there are opportunities to speak to individual customers and we should take those opportunities when they arise. But, in general, we often need to find other ways to ask customers our customers what they need from us.

2. Feedback

One way to do this is to ask for feedback. And there are lots of ways to do this.

If we provide a customer with some information or answer a question for them, we can follow up their request and ask them how useful they found our information and what else we could have done. For an online service, we can provide a form or link, so users can send us their comments. At the end of a talk, presentation, workshop or training session we can give participants a brief feedback form to fill in.

There are pros and cons of doing this – I will just mention two on each side:

- A positive is that you get information from someone who has used your service while the experience is still fresh in their mind.

- It's also short, direct, re-usable, quick to complete and easy to set-up and analyse.
- On the downside, feedback response rates often drop off sharply over time (so can be best to use sparingly or periodically, rather than all the time).
- Feedback won't give you information from people who DON'T use your service

3. Surveys

Surveys are a popular way of getting feedback on-line. They are easy to set-up with plenty of online services that you can use such as Survey Monkey, MailChimp, etc. You can either do very short/quick surveys with just a small handful of questions, or longer, more in-depth surveys. You can re-use surveys – asking the same questions over time will allow you to analyse trends, while asking different questions keeps it fresh, interesting and topical. You can reach both existing and potential clients with the same survey. But there are things you need to be aware of when using surveys:

- There is a whole science around survey design – how you ask a question can have a significant effect on how people answer it.
- You may be handling personal information when analysing survey results – you need to be aware of the relevant data protection rules that apply.
- Your client needs some incentive to spare the time to complete the survey (the longer or more frequent the survey, the greater the incentive). That may be as simple as influencing how you develop your services. But you need to be clear about why they should do it – what's in it for them?
- You will get answers to the questions you asked – but you may not get the reason why someone answered the way they did. For example, if you ask someone to rate your service on a scale of 1-10 and they answer '4', you may not find out why they gave you that score, unless you dig a little deeper...

4. In-depth interviews / focus groups

Which brings us on to in-depth 1-1 interviews or focus groups. These are an opportunity to get more detailed qualitative data, often alongside the quantitative data you may have already got through a survey. They can be very valuable in testing assumptions, trying out new ideas or finding out what lies behind feedback you may already have. They work best with a reasonably structured agenda, but which encourages clients to talk and offer their opinions (and, in the case of focus groups, interact with each other). These interviews are a considerable time commitment by the participants (and from your staff), so may not be easy to organise, and you need to ensure that you have a representative sample of clients.

As a form of feedback, these can give you some of the best and most insightful opinions about your service. But, like other feedback techniques, they come with caveats:

- The feedback you get is moderated by the person who is acting as interviewer or facilitator. They need to be trained to capture all that is said and not filter or influence responses to match their own thinking.
- Similarly, you need people with good communications skills who can get people talking but also bring them back to the structured agenda – this isn't easy, and staff may not feel comfortable doing this, if they are interviewing Members.
- It can be hard to get clients, who are time-poor, to spare the time to do this properly. It is not something to be done lightly or often. So, if you use this technique, plan it very carefully.

5. What do others want?

If it is difficult to get feedback from your clients then another way to find out what they want is to look at another type of user that has certain similarities and see what they use – it may be a good approximation, or at least a good starting point.

For instance, if we can't talk to Members then talking to their staff is the next best thing. But there may be other examples – they won't be exactly the same but may have some very specific things in common that might help you. Examples of professions that we sometimes use as comparators include:

- Journalists – need to keep right on top of current affairs and events; if something comes up they quickly need to browse through all the recent material on the same subject; they can often be on the move and need information to come to them wherever they are.
- Lawyers – obviously need a good / detailed understanding of legislation, how it might change, and what the impact would be of any change; they also need to brief themselves on both sides of an argument.
- Social workers – need a good casework management system.

You can also look at the functionality that is provided by some of the big commercial services and think about whether your own customers would benefit from something similar. A simple example of that might be: "other customers who bought X also bought Y" – similar functionality could be used to point your own customers to other relevant information or briefings which they might not be aware of.

I'm sure that you'll be able to think of examples that may be relevant to your own services & clients.

What ideas have we discussed before?

This is just an opportunity to review some of the other techniques that have been discussed at recent pre-conferences or open sessions. If you want to find out more details about these, the presentations are still available on the Section's web pages and you can use the link on the slides. Also, there may well be colleagues here from each country who could talk to you about their experiences.

Canada: Use of personas to design web services.

Personas are fictional characters, or stand-ins, for real people. They help turn the generic labelling of users into identifiable people that share similar behaviours, goals, attitudes, and work environments. You can then start to ask "What would this person do?"

Japan: Cooperation with research institutions, researchers and others in Japan and abroad to utilize their expertise in our research.

This provides an excellent opportunity to enhance staff's knowledge of the current state of affairs by drawing on expertise of international academics.

Also, the use of Member surveys. A combination of interviews of Diet Members and questionnaires for their staff; targeting a representative sample of 50 or 100 Members to create a balanced view.

Switzerland: Example of CUBE – uses business intelligence techniques to analyse procedural data and Member activity.

Brazil: Two Client-Oriented methodologies – Business Model Canvas & Design Thinking – both take the Client as a starting point and are built around client collaboration and interaction. We will come back to Design Thinking later.

Uganda: A service that had to adapt to considerable political & institutional change.

Steps taken include:– independent multi-skills research team with subject specialists, anticipatory research, building a skills base in scientific & creative skills, personal engagement with clients.

Lessons:– functional restructuring & re-alignment, continuous capacity building.

Netherlands: Development of a service-wide vision & strategy.

All about change management and staff engagement in process.

Lessons:- change needs a 'sense of urgency', a bottom-up approach takes time but very important for successful delivery of change.

Brazil: Project to implement a customer relationship management system (CRM) to manage client interaction across multiple channels.

Finland: A Member committee working with an academic Futures Research Centre to develop a national foresight system.

What ideas have we tried in Westminster?

In short, a bit of everything – if an idea is good then we'll try it

Customer Value Proposition (CVP): Why should a customer use our service, what's its value to them, what distinguishes our service from others they could use? Made use of structured interviews with Members and their staff. Has some similarities with the Brazil example of the Business Model Canvas.

Service-specific feedback: Used in short bursts for particular services (such as sending a short follow-up request for each research enquiry answered during a week).

Online surveys: Mainly used for our website, randomly selecting sample of users each month for a very quick/short survey to analyse trends in customer satisfaction.

Website personas: Exactly as the Canadian model. We also use selective User Experience testing alongside this.

User panels: We have used user groups of Members' staff to get feedback and try out ideas. Good relevant feedback but hard to maintain the group due to high turnover of researchers.

Exit interviews: We try to arrange in-depth interviews with Members who are retiring or standing down. Our experience is that these can be more honest in terms of what has worked and what didn't during their time in Parliament. (This highlights one of the problems we have experienced when asking Members for feedback – they usually tell us we are doing a great job, regardless of whether we have or not) because they want to thank us for our work and don't want to appear to criticise us. It is surprisingly hard to get constructive feedback from sitting Members).

Member surveys: We used to do long, extensive surveys of all Members at start & end of a Parliament but tended to get responses at either extreme with little in middle. We now do something like the Japanese example – periodic surveys of a representative sample of 50 Members (which varies each time). The comments are just as valuable (if not more) than the satisfaction scores they assign to each service.

What's coming up next week during the main conference?

Just a plug for our open session on Tuesday at 13:45 in Conference Hall 1. We have some wonderful speakers who will be talking on some very interesting topics. A couple that are relevant to this subject are:

- Janice Silveira from the Brazilian Chamber of Deputies on the practical use of Design Thinking as a tool of corporative innovation.
- Etienne Bassot the Members' Research Service at the European Parliament on Adjusting the offer to Members' needs - Innovative tools to reach in and reach out.

And not to forget our Networking Events that will be happening on Monday. An opportunity to meet to discuss topics informally over a coffee or tea and network with colleagues. I've flagged up two of the table discussions that are particularly relevant to the topic of Understanding Client's Needs:

- Design of research/information products
- How to evaluate impact of Parliamentary libraries and research services

But please don't forget the others covering: the use of social media, developing subject taxonomies & enriching descriptive information, and how Parliamentary libraries can contribute to the UN agenda 2030.

Discussion questions

Anyway, that is more than enough from me. And, since this is a workshop, it's now time for you to do some more work!

I want to use the time that is left in this session (xx mins) just to have an informal discussion about how we each work to understand our clients' needs. So, in the same groups as before I'd like you to consider these two questions:

- How are **your** clients' needs changing?
- What ideas do **you** have to find out what new services your clients might want?

Let's share our experiences together.