

Consumer Partnership in Industry: Are there lessons for Healthcare? A Literature Review

Executive Summary

Objective

In an attempt to learn more from industry about enhancing consumer partnership, a review of the literature was undertaken on models of ‘consumer partnership’ described and used by industries other than healthcare.

Methods

A search of the evidence was conducted using Google and Google Scholar to identify relevant documents published in English from 1980 to 2015. All document types were relevant for this review. Documents were screened for inclusion or exclusion in consultation with colleagues, using the inclusion criteria. ‘Consumer partnership’ was found to be strongly aligned to the healthcare industry whereas ‘customer engagement’ was the term used by other industries to describe ongoing participation, involvement and/or partnerships with customers. Therefore only documents that presented an explanation of a ‘customer engagement’ model or framework were included. A narrative synthesis of the included documents was conducted.

Results

The evidence search identified 12 documents that provided an explanation of a “customer engagement” model or framework. The information came from four industries: education, transport, energy and business. The results are presented under the two broad headings of conceptual aspects of customer engagement and practical steps to achieve customer engagement.

The table below (Table 1) gives a brief summary of findings:

Table 1. Summary of findings from industry

Conceptual aspects of customer engagement	Practical steps to achieve customer engagement
<p>Major elements of customer engagement:</p> <ul style="list-style-type: none"> ▪ Knowledge [3-6] ▪ Trust [3-6] 	<p>Organisational factors in achieving customer engagement:</p> <ul style="list-style-type: none"> ▪ Culture [5] ▪ Structure [5] ▪ Strategy and governance [12] ▪ Human resources [5] ▪ Learning [5]
<p>Guiding principles to achieve customer engagement:</p> <ul style="list-style-type: none"> ▪ Effective communication [5-11] ▪ Relevant and accessible information [6,7,10] ▪ Accountability and transparency/Openness [7] ▪ Mutual respect [7,8] ▪ Personalised and contextualised interactions with customers [6] ▪ Be inclusive [8,10] ▪ Evaluate (monitor and measure) [6,7,11] ▪ Respond [7,11] ▪ Customer-centric (Experience and Satisfaction) [4,6,7,9,11] ▪ Display consistent leadership [3] ▪ Employee engagement [9] ▪ Partnering with customers [3] 	<p>Appendix</p> <p>Examples of models and frameworks for customer engagement:</p> <ol style="list-style-type: none"> 1. A Model for Customer Engagement [6] 2. Customer Experience Management Programs [12] 3. Customer Experience Barometer [9] 4. Internal Elements critical to building meaningful Stakeholder Engagement [5] 5. Process for Meaningful Engagement [5]

Mapping the guiding principles of customer engagement in industry to consumer participation in healthcare

In order to identify any lessons for healthcare, the guiding principles of customer engagement in industry were compared to the principles of consumer partnership in healthcare described in the Victorian Department of Health Current State Report: Evaluation of Doing It With Us Not For Us [1]. This comparison map (Table 4) also included the current Monash Health Consumer, Carer and Community Participation Framework principles and approaches [2].

Are there lessons for healthcare?

- Consumer partnership principles in healthcare are not dissimilar to customer engagement principles in other industries. The review of literature indicates that healthcare is currently led by all (if not, more) guiding principles that have been identified in the other industries, with the exception of 'personalised and contextualised interactions with customers'. This describes how customer interactions and experience are tailored from, and informed by, an accurate understanding of the customers' preferences and information, in addition to knowing the stage and situation (context) the customer is at that particular time of interaction.
- Consumer partnership frameworks between industry, healthcare and Monash Health are also similar. The mapping table (Table 4, page 8) shows that healthcare and industry share similar guiding principles which support frameworks focusing on consumer participation and customer engagement, respectively.
- Guiding principles in both healthcare and industry include: effective communication, sharing relevant and accessible information, accountability and transparency, having mutual respect, being inclusive, evaluating (monitoring and measuring), responding, being customer-centric, displaying consistent leadership, engaging employees and partnering with customers.
- Both healthcare and industry value partnerships with their customers/consumers and that is clearly demonstrated by an extensive number of frameworks involving customer/consumer experience.
- Literature from industry indicates that customer feedback is incorporated into the decision-making process. Customers' feedback is consolidated into online customer engagement research reports which highlight key insights on customers' views and expectations of the organisation. The report also provides evidence to show how customer feedback contributes to decision-making.
- Monash Health engages consumers across committees in the organisation and consumers are directly involved in decision-making and governance, an aspect that was searched for but not identified in the industry literature.
- The Healthcare industry (including Monash Health) also has frameworks in place to support a learning culture within the organisation, equipping consumers with necessary skills to engage with health service providers as equal partners. Monash Health's co-design framework also ensures that consumers and service providers work effectively to co-design care.

Conclusion

According to the Victorian Department of Health Current State Report, Victoria has led the way in the development of consumer participation policy and has set out guiding principles for hospitals and other health services.

Guided by the principles of the Victorian Department of Health Current State Report, Monash Health has further developed and established consumer participation as a fundamental component of the organisational culture and strategic processes where consumer advisors are involved in the governance of health services from an individual to an organisational level.

The review of literature indicates that customer engagement and consumer partnership frameworks are similar between industry, healthcare and Monash Health. It is worthwhile noting that just as literature highlights the importance of frameworks that support external customer engagement strategies, processes and initiatives, it is equally important not to neglect important organisational factors that play a large role in achieving meaningful customer engagement. These factors are embedded into an organisation and include structure, culture, human resources and learning.

Industry also highlights 'knowledge' and 'trust' as two core elements that need to be combined over the customer journey, and staff who promote trust, are knowledgeable and deliver outstanding service are essential. Leadership must focus on building trust even before any concrete programs, or partnerships can be considered.

This document should be cited as:

Yap G. Garrubba, M. & Melder A. Consumer Partnership in industry: Are there lessons for Healthcare? A Literature Review (2015) Centre for Clinical Effectiveness, MonashHealth, Melbourne, Australia.

Full Report

Background

The Centre for Clinical Effectiveness was asked to review the literature on consumer partnership used in industries other than healthcare to learn more from industry about enhancing consumer partnership in service delivery.

In scoping the literature for appropriate search terms, 'consumer partnership' was found to be strongly aligned to the healthcare industry whereas 'customer engagement' was the term used by industry. For the purpose of the review and when discussing the results we will use the term 'customer engagement' to be inclusive of any combination of 'customers, stakeholders and consumers' with 'engagement, participation, involvement, experience and partnership'.

In order to identify any lessons for healthcare, this review will map guiding principles of customer engagement in industry to consumer participation in healthcare utilising the findings from the Victorian Department of Health Current State Report: Evaluation of Doing It With Us Not For Us [1]. This report describes the current state of consumer participation policy and practice in Australia and selected international jurisdictions, as well as the current Monash Health Consumer, Carer and Community Participation Framework [2].

Methods

Search strategy

A search of the evidence was conducted using Google and Google Scholar to identify relevant documents published in English from 1980 to 2015. All document types were relevant for this review.

Documents were screened for inclusion or exclusion in consultation with colleagues, using the inclusion criteria set out in the table below. Only documents that presented an explanation of a customer engagement model or framework were included. A narrative synthesis of the included documents was conducted.

Table 2. Inclusion Criteria

Documents	Inclusion:	Any documents referring to a customer engagement framework (inclusive of the terms consumer, stakeholder, partnership, participation, model, strategy and concept)
	Exclusion:	All documents not presenting a customer engagement framework
Setting	Inclusion:	Any service industries
	Exclusion:	Healthcare
Publication Details	Inclusion:	All types of documents were relevant for inclusion in this review including organisation reports, systematic reviews, literature reviews, trials, evaluation reports, webpages and news releases.
	Exclusion:	Non-English publications
Publication Date		1980 – Present (July 2015)
Databases Searched		Peer reviewed literature database: ABI Inform Complete Grey literature source: Google and Google Scholar

Results

The search identified 12 documents that provided an explanation of a customer engagement model or framework. The information came from four industries: education, transport, energy and business. A narrative synthesis of the included documents is presented below and has been divided into conceptual aspects and practical steps of customer engagement.

Terminology

As mentioned previously, in scoping the literature for appropriate search terms, 'consumer partnership' was found to be strongly aligned to the healthcare industry whereas 'customer engagement' was the term used by industry. It is important to note, that in the industry literature the terms 'stakeholders and customers' and 'engagement, participation, involvement, experience and partnership' were used interchangeably. Often these terms were used either without distinction or used to specifically explain distinct aspects.

Given the interchange of language, and overlap in meanings and concepts, when discussing the results of this review the term ‘customer engagement’ is used to be inclusive of any combination of ‘customers, stakeholders and consumers’ with ‘engagement, participation, involvement, experience and partnership’ unless a distinct explanation is made.

Conceptual aspects of customer engagement

Knowledge and Trust as major elements of customer engagement

The customer engagement frameworks [3-6] included in the review highlighted ‘knowledge’ and ‘trust’ as the two fundamental elements which support effective customer engagement within the identified industries (education, energy, transport and business).

Knowledge and trust work hand in hand. Knowledge between the parties involved is what generates trust and the trust is the currency for engagement [6]. If the business does not know the customer, or does not have the right information to provide when the customer interacts with it – it is highly unlikely that it will either engender trust or create engagement [6].

Trust is an essential component of the engagement equation and can only be generated by using the customer knowledge that a business has to shape and inform its interactions at all customer touch points. With trust, the knowledge exchange deepens and in turn improves each individual experience and over time the more personalised, contextual and relevant the interactions a customer has, the greater the degree of engagement [6].

For an example, see Example #1: A customer engagement model – highlights knowledge and trust as two core elements that need to be combined over the customer journey in Appendix.

Guiding principles to achieve customer engagement

Guiding principles help drive customer engagement and can be embedded into an organisation’s culture [7]. They help to deliver good experiences which build engagement and lead to customer satisfaction, loyalty and building advocacy – the outcomes and benefits of engagement [6]. The following is a list of guiding principles to achieve customer engagement that were identified across industries from eight resources.

Table 3. Guiding principles to achieving customer engagement

Effective communication
Communication enhances knowledge and information shared between both parties. This is strengthened by “two-ways”, [8] “ongoing communication” and involves “active listening” to feedback [5, 7, 9]; utilising all different communication channels for this; (i.e. live events, forums, social media, meet manager, surveys, complaints correspondence, online surveys, etc.) [7, 10, 11]. Guiding principles and customer engagement strategy emphasise that methods of communication should be “flexible”, “evolve” [7] and involve “personalisation” [6] to suit customer preference.
Relevant and accessible information
Industry highlights that information they hold about their customers is “useful and relevant” to their interactions [7]. Decision-making is informed by utilising information that the organisation has about their customers [7]. To build effective relationships with customers, businesses need to ensure that their interactions are relevant and appropriate to suit each customer [6]. For example understanding customer lifestyle choices and expectations allow industries to offer relevant services to meet customer needs.
Customer information should be visible in one place, in real-time or near real-time. This is done by removing fractured pictures of the customer and replacing them with a single view of a customer’s details, history and preferences regardless of where they live, channel preferences or what systems of record are being used [6]. Strategies to support the engagement framework in the Education industry highlight that communication regarding how to access information in other languages is also important [10]. In the Department of Education, Training and Employment, strategies include appointing liaison personnel to teach the “language” of the industry where ongoing messages are shared [10]. The energy industry state that information is shared and openly available and accessible to customers [7].
Accountability and transparency/Openness
There is a need to understand who may be affected by a decision and provide clear information to these customers about opportunities to participate [7]. To be accountable means to be upfront with customers about what influences the way the organisation does its work, what constraints it has and where customer expectations can and cannot be met [7].

The customer engagement plan for Energex is to be transparent to their limitations (i.e. regulatory or commercial requirements) and why certain feedback is not able to be implemented [7].

Mutual respect

Principles of mutual respect and trust are fundamental to establishing effective stakeholder engagement, [8] where respectful relationships are developed with customers [7]. Organisations value stakeholders and actively seek to understand their needs and how they want to be engaged, based on their particular circumstances [8]. To maximise the effectiveness of stakeholder engagement, the Department of Education and Early Childhood Development expects stakeholders to be open, transparent, trustworthy and respectful in all engagement processes [8].

Personalised and contextualised interactions with customers

Interactions and experience need to be personalised if engagement is to be built. These must be rooted in an accurate understanding of the customer. Interactions should be tailored from, and informed by, customer preferences, customer information and insights from their journey behaviour [6].

Businesses need to provide a tailored, adaptive and often predictive experience informed by context. Taking elements that enable personalisation (profile and history context), in addition to understanding what stage and situation a customer is in at a particular time (journey and location context) and how they are technologically interacting at the time (device context) informs an interaction that is contextually appropriate for the customer [6].

Be inclusive

Consult to reach a cross-section of students, parents and community members, not just the most confident or outspoken [10] and facilitate engagement including those who will be harder to reach due to language/culture, age or mobility [8].

Evaluate (monitor and measure)

There should be a method of monitoring customer engagement. For example, in Southeastern, a customer satisfaction board collates information, identifies improvement areas, and assesses viability and schemes, program development and implementation [11]. Ultimately, success is measured (via surveys and audits) [11] and a system of feedback loop to ensure that business is constantly learning, and improving engagement, and shareable within the business is created [6].

There also should be a method of evaluating the effectiveness of engagement. Success is defined early on and outcomes measured the along the way [7].

Respond

Energex is not only committed to respond to their customer needs in a timely and efficient manner, but also to respond to feedback and any challenges addressed in their customer feedback. A customer engagement research report that consolidates customers' feedback and highlights key insights on customers' views and expectations of the organisation is made available online. The report provides a response to feedback provided and explains where certain expectations are met or cannot be met, and provide evidence to show how customer feedback contributes to decision making [7]. In Southeastern, customers are informed of progress regularly through customer reports [11].

Customer-centric (Experience and satisfaction)

Keep customers at the "heart of your business", where a customer-centred focus leads to improved customer lifetime value [9].

It is important to identify who the organisation's customers are, and what their needs/expectations are for whole customer journey [11]. This includes pre-journey as well as post-journey [11]. Having a focus on where, when and how customers interact with the organisation, and focusing on journeys across all departments and channels, rather than individual experiences are crucial. It is imperative for businesses to focus on how to better interact with customers, how to build stronger relationships, and how to ensure that those relationships generate trust and engagement over time [6].

For an example, see Example #2: Customer Experience Management Programs in Appendix.

Having a sense of commitment to the customers will ensure that customers' expectations and concerns are considered in decision-making, as well as shaping and alignment of services to evolving views and expectations [7]. The customer experience barometer was designed to provide a simple means of measuring, tracking and benchmarking customer experience. [9]

For an example, see Example #3: Customer Experience Barometer in Appendix

Adopt strategies to perfect customer experience [4]

- *Create an organisational common purpose*

The essential foundation on which all other service decisions can be developed, a common purpose is a succinct explanation of what you want the customer experience to be at the emotional level. It represents to all employees what you stand for and why you exist, and it is the primary tool for getting everyone “on the same page.”

- *Get to know your customers holistically.*

Your knowledge of the customer must extend far beyond the boundaries of traditional service criteria. Truly understanding their needs, wants, emotions, and industry stereotypes is the key to creating personalised interactions. “Listening posts” are an excellent example of a customer-centric tool that companies can use to assess the customer experience and immediately identify areas where customer expectations are (or are not) being met and exceeded.

- *View exceptional service as an economic asset rather than an expense.*

With lifetime customer relationships at stake, the return on investment for providing consistently exceptional service clearly justifies the short-term cost. In these times of significant change, stronger innovators will inevitably outperform weaker innovators, so keep an eye on the future and ensure your customer service experience does not become a commodity.

Display consistent leadership

A way to build strong relationships with your customers over time is through leadership. In the end they will see the value-add that you provide through your consistent leadership and communication, and many issues can be avoided [3].

Employee engagement

Customers suggest that ‘staff engagement’ is the most important attribute for service providers. It is the quality of the people – not the technology – that matters most to customers. So while customer experience levels are highest within those that self-serve through automation and online services, customers still place significant importance on their interactions with the human face of an organisation (through face-to-face or telephone channels) [9].

An organisation is measured by the quality of its people: Staff who promote trust, are knowledgeable and deliver outstanding service will be essential [9].

Partnering with customers

Customer partnership is a long-term commitment to a business relationship based on understanding each partner’s expectations and values, dedication to common goals, and trust. Being a partner can redefine the way you interact with your customer. The goal is to move away from the traditional adversarial relationship and into a collaborative and innovative partnership [3].

Mapping the guiding principles of customer engagement in industry to consumer participation in healthcare

In order to identify any lessons for healthcare we have mapped the guiding principles of customer engagement in industry to consumer participation in healthcare and Monash Health. We utilise findings from the current review along with the Victorian Department of Health Current State Report: Evaluation of Doing It With Us Not For Us [1] which describes the current state of consumer participation policy and practice in Australia and selected international jurisdictions as well as the current Monash Health Consumer, Carer and Community Participation Framework [2] and relevant frameworks. Figure 1 illustrates evidence-based approaches to promote consumer participation in healthcare on three different levels (system, service and individual) [1].

Figure 1. Evidence based approaches to promote consumer participation in healthcare

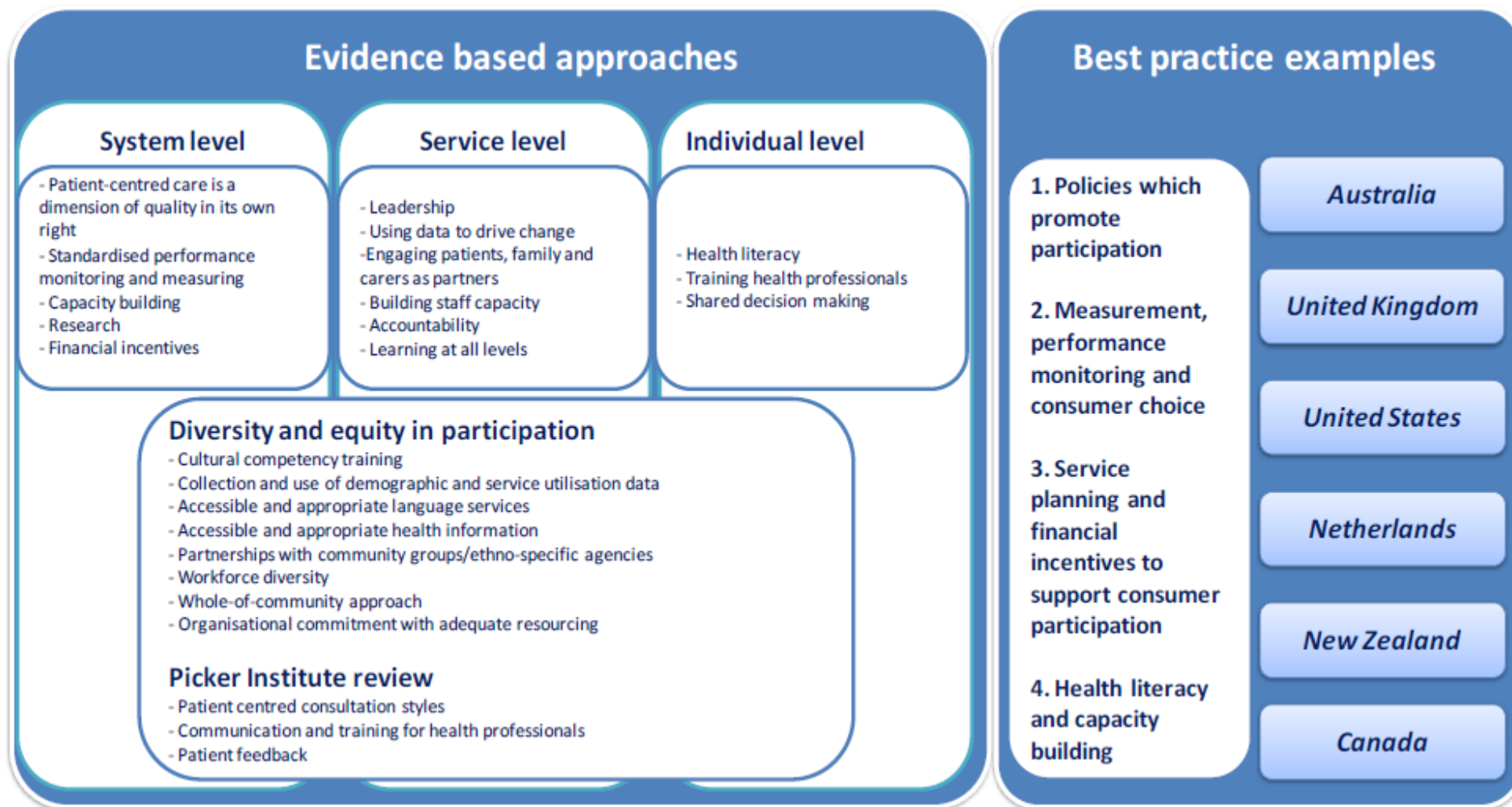


Table 4. Mapping the Guiding principles of customer engagement (industry) / consumer participation (in healthcare)

Guiding Principles	Industry	Victorian Department of Health Current State Report	Monash Health*
Effective communication	Flexible methods of communication that enhances knowledge and information shared between both parties. This involves two-way, active communication using different channels of communication.	Training for health professionals in communication. (individual level)	<ul style="list-style-type: none"> ▪ Staff have the opportunity to further their communication skills via the Monash Health Learning Management System (LMS) and Patient Centred Care (PCC) education program. ▪ Consumer Liaison Officers (CLOs) effectively engage in two-way communication between consumers and staff, including family meetings ▪ Consumers are made aware of communication channels (internet, email, telephone, hard copy forms) to provide any feedback to Monash Health.
Relevant and accessible information	Information the organisation holds on their customers must be useful and relevant to their interactions with customers. The information is also utilised in decision-making. Shared information is made accessible in other languages, and customers are educated on the “language” of the industry.	Strategies include the provision of well written health information for service users, the use of the web-based resources, provision of personalised computer-based information and virtual support as well as tailored information for individuals with low levels of health literacy. (individual level)	<ul style="list-style-type: none"> ▪ Monash Health Annual Report, Quality of Care Report and Research Reports, and Monash Health Quarterly newsletter are available via hard copy and internet. ▪ Monash Health Patient Information procedure – <i>Creating information/materials for consumers and patients</i> ensures that information provided to consumers are relevant to their care or service, and written in language that is easily understood by patients. ▪ Translated patient information is available as required.
Accountability and transparency/openness	Being clear to customers about how they are affected by decisions, providing opportunities to participate. It is important to be upfront with customers about what influences the way the organisation works and the constraints it has	The strategies to support this include incorporating responsibility for improving patient care experience in job descriptions, considering patient feedback during staff performance reviews, including performance metric and performance incentives for	Consumers on Committees framework provides opportunities for consumer to participate in decision-making in Monash Health through the following: <ul style="list-style-type: none"> ▪ Quality and Safety reporting (Quality and

Guiding Principles	Industry	Victorian Department of Health Current State Report	Monash Health*
	where their expectations can or cannot be met.	demonstration of patient-centred practice at staff and governance levels, incorporating consumer participation and patient experience metrics into performance monitoring and reporting, ensuring agenda for board or governance committee meetings include a strong emphasis on quality issues, including patient experience. (service level)	<p>Safety Program Committees, Standard Committees, Community Advisory Committee, site and program based Consumer Advisory Groups)</p> <ul style="list-style-type: none"> ▪ Quality and Safety Boards (wards/units/departments) ▪ Consumer review of patient information <p>Information is openly available on Monash Health intranet and internet for staff, consumers and the community.</p>
Mutual respect	Principles of mutual respect and trust are fundamental to establishing effective stakeholder engagement where respectful relationships are the developed with customers and organisations actively seek to understand their needs and how they want to be engaged.	The right for respect is mentioned in the State Report under The Australian Charter of Healthcare Rights in Victoria and is one of the eight Picker (Institute) principles of patient-centred care.	Monash Health Rights and Responsibilities brochure (based on Australian Charter of Healthcare rights) is available online and in hard copy
Personalised and contextualised interactions with customers	Customer interactions and experience need to be tailored from, and informed by, an accurate understanding of the customers' preferences and information, in addition to knowing the stage and situation (context) the customer is at that particular time of interaction.		Monash Health's Consumer, Carer, and Community Participation Framework, patient-centred care (individual level) and consumer participation (service level) is incorporated into the consumer advisor orientation and staff training.
Be inclusive	This means to reach a cross-section of community members not just the most confident or outspoken, including those who will be harder to reach due to language/culture, age or mobility.	<p>This is enabled by cultural competency training, utilising demographic data, appropriate language services and health information, partnerships with community groups, workforce diversity, whole-community approach, organisational commitment withy adequate resourcing. (individual)</p> <p>This principle is supported by the following frameworks:</p>	<p>Inclusiveness is supported by:</p> <ul style="list-style-type: none"> ▪ Consumers on Committees framework ▪ Consumer, Carer and Community Participation framework ▪ Community Participation Plan ▪ Asking the question (Aboriginal and Torres Strait Islander Community) ▪ Point of Care audit which is inclusive of

Guiding Principles	Industry	Victorian Department of Health Current State Report	Monash Health*
		<ul style="list-style-type: none"> ▪ 'Doing it with us not for us' framework ▪ Cultural Responsiveness framework ▪ Disability framework ▪ Improving Care for Aboriginal Patients (ICAP) Program reporting 	<p>consumers from all languages/cultures, ages or mobility.</p> <ul style="list-style-type: none"> ▪ Diversity initiative – Aboriginal Health Working Group/Executive Steering Committee, Cultural Diversity Working Group, Residents groups (aged care), Mental Health Consumer and Carer Advisory Group, Monash Health Community Consumer Advisory Group, Monash Health Youth Advisory Group
Evaluate (monitor and measure)	<p>There should be a method of monitoring and measuring (success outcomes) for evaluating the effectiveness of customer engagement, and a system of feedback loop to ensure that business is constantly learning, and improving engagement, and shareable within the business is created. It is important to also provide evidence to show how customer feedback contributes to decision making.</p>	<p>Adequate systems for coordinating patient experience data collection, assessing its quality, or learning from and acting on the results in a systematic way. (service level)</p> <p>Ensure processes and outcomes that are associated with quality, safety and experience of care are measured. Funding and accreditation is linked to patient satisfaction measurements. Development of standardised measures to facilitate comparison and benchmarking are strategies used to ensure measurement and monitoring activity is used to drive improvement. (system level)</p> <p>Strategies to support shared decision making and self-management (individual level)</p>	<ul style="list-style-type: none"> ▪ Patient feedback mechanisms and reporting through patient experience surveys, Victorian Health Experience Survey (VHES), mystery shopper, consumer feedback (compliments and complaints). ▪ Monash Health monitors and measures patient experience and performs thematic analysis of Patient Experience data. ▪ Quality and Safety metrics are reported to Executive Management Team (EMT) and Board every month. Information is available to site-based consumer advisory groups and shared on boards in hospital wards. ▪ Consumer Advisor and Community Advisory Committee member annual evaluation and Consumer Participation (annual staff) evaluation ▪ Annual reporting to Department of Health and Human Services
Respond	<p>The organisation is not only committed to respond to their customer needs in a timely and efficient manner, but also to respond to feedback and any challenges addressed in</p>	<p>Mentioned in the State Report under the NHS Operating Framework 2012-2013 that involves responding positively in line with patient feedback, and as an objective Tasmania's</p>	<ul style="list-style-type: none"> ▪ Consumer Liaison Officers (CLO) are responsible for communicating and coordinating responses (to both complaints and compliments) to consumers in a timely

Guiding Principles	Industry	Victorian Department of Health Current State Report	Monash Health*
	their customer feedback. This may be in the form of customer reports where customers are informed of progress regularly and evidence to show how customer feedback contributes to decision making.	consumer, carer and community engagement framework.	manner.
Customer-centric (Experience and satisfaction)	It is important to identify who the organisation's customers are and their needs/expectations for whole customer journey. Customer experience is the focus and perfected by creating an organisational common purpose.	<p>A systematic approach to implementation that integrates consumer participation strategies and actions across the organisation is critical to embed participation approaches and patient centred care as "business as usual". (system level)</p> <p>The benefits of a patient-centred approach recognises the strong evidence that it can lead to improvements in health care quality and outcomes by increasing safety, cost-effectiveness and patient, family and staff satisfaction. (system level)</p>	<p>Monash Health has the following in place:</p> <ul style="list-style-type: none"> ▪ Patient Centred Care education program ▪ Patient Centred Care training ▪ Patient Centred Care workplan
Display consistent leadership	Customers will see the value-add that an organisation provides through consistent leadership and communication. (Stakeholder) Engagement behaviour is embedded throughout all layers of the organisation and reflected and supported by organisational culture, and senior leadership demonstrates commitment to the issues.	Setting priorities and communicating the need for change across levels of the organisation. Designating a senior manager or executive for implementing consumer participation policy and strategy, who model patient-centred behaviour. (service level)	A safety culture/ iCARE values of putting patients' first are inculcated at the Board, Executive, Strategic Steering Committees levels, and incorporated into Monash Health Business Plan, workplans and Strategic Plan and Statement of Priorities.
Employee engagement	Customers suggest that 'staff engagement' is the most important attribute for service providers. It is the quality of the people that matters most to customers. Customers place significant importance on their interactions with the human face of an organisation. An organisation is measured by the quality of its people: Staff who promote trust, are knowledgeable and deliver outstanding service are essential.	<p>Increasing staff skills to support patient-centred care delivery which involves consumer involvement into training and integration of patient-centred care values into staff orientation sessions. (service level)</p> <p>Recognising the link between staff experience and patient experience. Staff feedback on work environment is used to improve work culture and processes. (service level)</p>	<p>Monash Health's Capability Framework includes training opportunities via the Monash Health Learning Management System (LMS):</p> <ul style="list-style-type: none"> ▪ Patient Centred Care training, ▪ Communication skills training ▪ Consumer Participation at Monash Health <p>Consumer Participation (annual staff) evaluation</p>

Guiding Principles	Industry	Victorian Department of Health Current State Report	Monash Health*
Partnering with customers	Customer partnership is a long-term commitment to a business relationship based on understanding each partner's expectations and values, dedication to common goals, and trust. Being a partner can redefine the way you interact with your customer. The goal is to move away from the traditional adversarial relationship and into a collaborative and innovative partnership.	Partnering in service redesign and co-design projects, engaging consumers in incident investigation systems and processes as well as educational programs for healthcare professionals and administrative leaders, establishing and involving consumers in open disclosure processes following adverse events, establishing and escalation of care for deteriorating patients, involving consumers at the governance level. (service level)	<p>Monash Health Capability framework</p> <ul style="list-style-type: none"> ▪ Includes iCARE values ▪ Partnering with Consumers at Monash Health training <p>Consumers on Committees framework</p> <ul style="list-style-type: none"> ▪ Consumer advisors are provided with Information Kits and orientation.
Capacity building through research		<p>There is a need for further research and evaluation to determine best practice as a basis to develop tools models and educational strategies to promote consistent evidence-based practices. (system level)</p> <p>Example include asking patients to participate in decisions on treatment choices, and creating “zone of openness” where patients are helped to voice out their (conflicting) opinions to doctors.</p>	<ul style="list-style-type: none"> ▪ The Centre for Clinical Effectiveness provides research support in evidence based medicine, clinical guidelines and new technologies.
Capacity building of consumers		Ensuring that consumers have the necessary skills and capacity to engage with health service providers as equal partners is critical to effective engagement.	<p>Other frameworks and plans to enhance community engagement include:</p> <ul style="list-style-type: none"> ▪ Co-design framework ▪ Community Participation Plan ▪ Consumers on Committees framework ▪ Consumer, Carer and Community Participation framework ▪ Consumer advisor orientation opportunities <p>Patient Centred Care plan</p>
A learning culture		Culture of learning and strongly supporting change and improvement.	<p>Learning culture is supported by</p> <ul style="list-style-type: none"> ▪ mySafety ▪ People and Culture team ▪ Innovation and Quality Unit

* Information on Monash Health frameworks extracted from the Patient Experience intranet page: http://intranet/quality/Quality%20Unit/Patient%20Experience/patient_experience_stream_homepage.html

Practical steps to achieve customer engagement

Organisational factors in achieving customer engagement

The focus of much literature is on how organisations engage customers through external processes while reports from the Doughty Centre, Cranfield School of Management (2009) [5] and Hayes (2012) [12] highlight important organisational factors which play a large role in achieving meaningful customer engagement as well as key customer experience management best practices in strategy and governance, respectively.

The considerations listed in Table 5 outlines strategies and best practices to be implemented or items to be addressed as a means to maximise the impact and success of meaningful stakeholder relations. [5] [12]

These factors include:

- organisational culture
- organisational structure
- organisational human resources
- organisational learning
- strategy and governance

For examples, see Example #4: Internal elements critical to building meaningful stakeholder engagement – illustrates how each element (Leadership, Organisational Behaviour and Capabilities) play a complementary role in assisting the organisation to progress to a position where meaningful engagement with stakeholders is achievable; and Example #5: The process for meaningful stakeholder (customer) engagement

Table 5. List of organisational strategies and practices to maximise impact and success of meaningful engagement [5] [12]

Organisational Culture
<ul style="list-style-type: none">▪ Ensure that successful stakeholder engagement behaviour is embedded throughout all layers of the organisation and is reflected and supported by organisational culture. Take steps to modify and adapt the organisation culture if necessary.▪ Staff should be encouraged to understand and develop their thinking regarding the motivation for conducting stakeholder engagement, i.e. why an organisation is doing this and what value is being created.▪ Appropriate leadership from the very top of the organisation is needed to demonstrate real commitment to these issues. This should be conducted not only through words and declarations, but also through deeds; staff should be able see senior management of the organisation actively employed in stakeholder engagement at the highest levels, on a regular basis.▪ Organisation policy must critically be reflected in organisation practice; otherwise, internal and external stakeholders will not regard the process as being valid, legitimate or believable.▪ Stakeholder engagement should be reflected in the actions and intentions of both business operations and corporate responsibility (CR) staff. Efforts should be made to ensure that staff across different departments are able to recognise the value created for the organisation as a whole, otherwise potential conflict may arise.▪ Provide managers who establish and develop stakeholder relations with a degree of freedom and autonomy so that they can 'take risks' and 'surprise' stakeholder organisations who may have 'set' views of business.▪ To encourage stakeholder relations, CEOs must show leadership, publicly support these managers and, where appropriate, be seen to be taking risks themselves. CEOs should work to make the engagement process credible to other, more traditional stakeholders.▪ Recognise that the central focus of stakeholder relations needs to be in the building of trust even before any concrete programs, or partnerships can be considered. This may involve the organisation revisiting its preconceptions regarding stakeholder organisations and vice versa, and may involve examining long-standing embedded practices.▪ 'Do not just talk to those with whom you agree'; it is important for managers to maintain a dialogue with those with whom they disagree and maintain a position of active negotiation with them i.e. be willing to concede on issues as a way of making progress.▪ Senior management should get involved in the wider debate about how society builds strong institutions and overcomes challenges as a way of demonstrating commitment.

Organisational Structure

- The senior management of an organisation should clearly demonstrate that stakeholder engagement is regarded as a strong facilitator of business success. They should 'own' the concept so that when it is delegated to operational level staff a clear message is given that the work is valuable and necessary. As discussed earlier, engagement should be embedded within the organisation, with nominated individuals who can transmit the appropriate skills and knowledge to those who need them.
- Consideration should be given as to whether this task should report directly to the CEO, rather than be located in corporate affairs; successful stakeholder engagement is a strategic function and not a communications function as it provides value for, and feeds into, all business areas of the organisation.
- Those responsible should promote excellence in stakeholder engagement across the organisation, ensuring that staff in critical positions (such as country managers) have the necessary support and tools to carry out this role. A variety of staff from across different departments, different functions and different levels in the organisation should be encouraged to engage with stakeholders in a strategic manner.
- The organisation should promote the understanding of the importance for – and support of – the creation of relations between the organisation's staff and stakeholders, recognising that such relations can bring unique, difficult to replicate and immense value to the organisation.
- Build the capacity of the organisation to better empathise with stakeholders; this will help to grow the appreciation for stakeholder motivations and objectives.

Organisational Human Resources

- Companies need to ensure that they have access to new capabilities, in particular to seek out talented staff who come from diverse, varied and alternative backgrounds, who will be able to bring unique perspectives and skills to assist the organisation in its efforts to build relations with stakeholders
- Continuously develop in-house skills of existing staff and expose them to unfamiliar environments, to ensure that they stay up-to-speed with fast changing business necessities regarding engagement.
- Recognise that companies are made up of individuals and excellence in stakeholder relations relies on individual human actions. Innovation and entrepreneurship in this area by staff should be supported, rewarded and developed.
- Hire new talent that is skilled in building trust, has a high degree of emotional intelligence, and can demonstrate empathy for stakeholders; in addition such managers should be good communicators, and have excellent negotiation skills. These may well be talented individuals who have previously worked for stakeholder organisations, or specialised consultancies.
- Hiring staff from stakeholder organisations, or investing in secondments to/from stakeholders' organisations, is perhaps one of the best ways to improve knowledge and understanding of stakeholders and their priorities.
- Build the case within your organisation for institutional expenditure for strengthening internal stakeholder engagement capacity as a cost-effective mechanism to mitigate risk.

Organisational Learning

- Appropriate training should be provided for staff if necessary to support and promote the objectives listed above.
- Like any other specialty, task within the business, stakeholder engagement should be regarded as a mixture of science and art where continued learning can help improve the performance of the organisation, and potentially create more value. Stakeholder engagement is an iterative process where learning from action should be continually fed back to improve that action.
- On occasion, embedded practice will actually develop ahead of policy, leading to the need for the organisation to review its present practice, extract learning, and disseminate it across the organisation.
- Broaden the ability of all staff to conduct analysis regarding stakeholder motivations, objectives and value. This can be achieved through increased training and greater diversity of business staff, in particular drawing on those that have civil society and stakeholder backgrounds.
- Develop stakeholder strategy in parallel with the business strategy and alongside the development of a framework to understand the changing stakeholder environment (geopolitical trends, stakeholder views, and their relative influence). Use scenarios to assess the influence of both sets of issues in immediate and longer term planning.
- Utilise specific and specialised socio-political analytical skills from sophisticated and specialised sources to help

the business identify strategies to work with stakeholders.

- Ensure that knowledge and learning is captured and shared across your organisation, to guarantee that advances and activities are retained, shared and transmitted to additional staff.

Strategy and Governance

▪ **Incorporate a customer-focus in the vision/mission statement**

Support the company mission by presenting customer-related information (e.g., customer satisfaction/loyalty goals) in the employee handbook. Use customer feedback metrics to set and monitor company goals.

▪ **Identify an executive as the champion of the customer feedback program**

A senior level executive “owns” the customer feedback program and reports customer feedback results at executive meetings. Senior executives evangelise the customer feedback program in their communication with employees and customers. Senior executives receive training on the customer feedback program.

▪ **Incorporate customer feedback as part of the decision-making process**

Include customer metrics in company’s balanced scorecard along with other, traditional scorecard metrics. This practice will ensure executives and employees understand the importance of these metrics and are aware of current levels of customer satisfaction/loyalty. Present customer feedback results in company meetings and official documents.

▪ **Use customer feedback metrics in incentive compensation for executives and front-line employees**

Use key performance indicators and customer loyalty metrics to measure progress and set performance goals. Ensure these measures can be impacted by employee behaviour. Where possible, use objective business metrics that are linked to customer satisfaction as key performance indicators on which to build employee incentive programs.

▪ **Build accountability for customer satisfaction/ loyalty goals into the company**

Incorporate customer feedback metrics into key performance measures for all employees. Include customer-centric goals in the company’s performance management system/processes. Employees set customer satisfaction goals as part of their performance objectives.

Are there lessons for healthcare?

- Consumer partnership principles in healthcare are not dissimilar to customer engagement principles in other industries. The review of literature indicates that healthcare is currently led by all (if not, more) guiding principles that have been identified in the other industries, with the exception of 'personalised and contextualised interactions with customers'. This describes how customer interactions and experience are tailored from, and informed by, an accurate understanding of the customers' preferences and information, in addition to knowing the stage and situation (context) the customer is at that particular time of interaction.
- Consumer partnership frameworks between industry, healthcare and Monash Health are also similar. The mapping table (Table 4, page 8) shows that healthcare and industry share similar guiding principles which support frameworks focusing on consumer participation and customer engagement, respectively.
- Guiding principles in both healthcare and industry include: effective communication, sharing relevant and accessible information, accountability and transparency, having mutual respect, being inclusive, evaluating (monitoring and measuring), responding, being customer-centric, displaying consistent leadership, engaging employees and partnering with customers.
- Both healthcare and industry value partnerships with their customers/consumers and that is clearly demonstrated by an extensive number of frameworks involving customer/consumer experience.
- Literature from industry indicates that customer feedback is incorporated into the decision-making process. Customers' feedback is consolidated into online customer engagement research reports which highlight key insights on customers' views and expectations of the organisation. The report also provides evidence to show how customer feedback contributes to decision-making.
- Monash Health engages consumers across committees in the organisation and consumers are directly involved in decision-making and governance, an aspect that was searched for but not identified in the industry literature.
- The Healthcare industry (including Monash Health) also has frameworks in place to support a learning culture within the organisation, equipping consumers with necessary skills to engage with health service providers as equal partners. Monash Health's co-design framework also ensures that consumers and service providers work effectively to co-design care.

Conclusion

According to the Victorian Department of Health Current State Report, Victoria has led the way in the development of consumer participation policy and has set out guiding principles for hospitals and other health services.

Guided by the principles of the Victorian Department of Health Current State Report, Monash Health has further developed and established consumer participation as a fundamental component of the organisational culture and strategic processes where consumer advisors are involved in the governance of health services from an individual to an organisational level.

The review of literature indicates that customer engagement and consumer partnership frameworks are similar between industry, healthcare and Monash Health. It is worthwhile noting that just as literature highlights the importance of frameworks that support external customer engagement strategies, processes and initiatives, it is equally important not to neglect important organisational factors that play a large role in achieving meaningful customer engagement. These factors are embedded into an organisation and include structure, culture, human resources and learning.

Industry also highlights 'knowledge' and 'trust' as two core elements that need to be combined over the customer journey, and staff who promote trust, are knowledgeable and deliver outstanding service are essential. Leadership must focus on building trust even before any concrete programs, or partnerships can be considered.

Acknowledgments

The authors wish to thank Sandra Rogers and Rebecca Edwards from the Patient Experience Team for their input.

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12. **Customer Experience Management Programs**

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Appendix

Examples of Models and Frameworks for Customer Engagement

The review of the literature identified two models which illustrate customer engagement models, one model that outlines the process of customer engagement and two models that look specifically at customer experience as part of the engagement process. Examples of the models and frameworks are presented below.

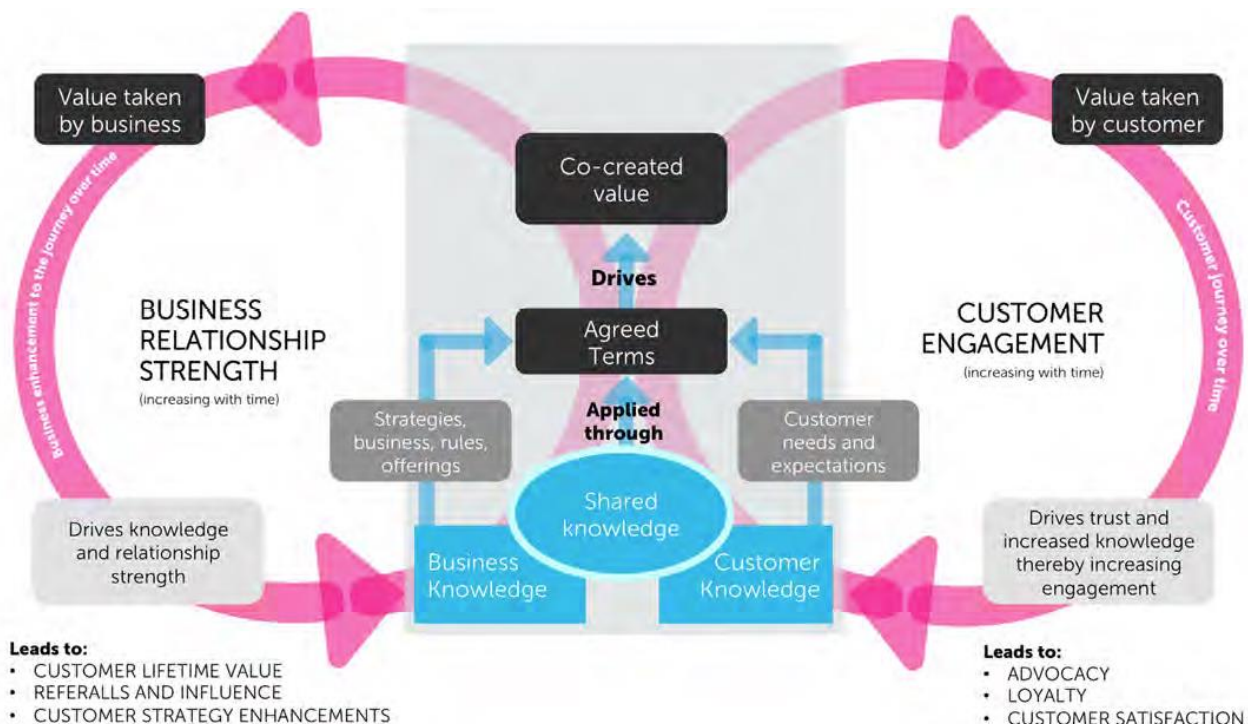
Example #1 – A Model for Customer Engagement

Thunderhead. 2014. Engagement 3.0: a new model for customer engagement. US report; Thunderhead.com [6]

Thunderhead (2014) have developed a model based on a review and analysis of current research around customer engagement, refining the theory through practice and experience working with organisations spanning financial services, insurance and telecoms sectors. The model outlines the fundamental building blocks necessary to enable organisations to manage rapidly evolving customer expectation and adapt to the increasing sophistication of communication channels in order to seize the opportunities these present [6]. There key approach is to ensure companies are building genuine engagement over time rather than merely good individual experiences. The model takes a holistic view of the entire customer journey, aligning the needs of the customer with the overall business strategy at every point of interaction to deliver a relevant, valuable and personal experience. It outlines the importance of engagement with forming relationships and highlights knowledge and trust as two core elements that need to be combined over the customer journey [6].

Fundamentally, the model shows that “engagement is built through the ability of the customer and the business to derive value from the relationship over time, and that the value obtained at each point of interaction is co-created by the customer and the business. The value taken by the customer and the business need not be equal or the same type. The ability of the business to enable value creation over time builds trust, and the accumulation of trust, and shared knowledge, builds engagement” [6].

Figure 2. Model for Customer Engagement



Example #2 – Customer Experience Management Programs

Hayes, B. 2012. Customer Experience Management Programs, Business over Broadway, Web Blog [12]

Hayes (2012) presents a Customer Experience Management Program which consists of a set of organised actions that support the goal of Customer Experience Management (CEM). Hayes explains that while a Customer Experience Management program has many moving parts, an easy way to organise those pieces is depicted in Figure 4 and explained below.

A CEM program has several major components:

1. **Strategy** addresses how companies incorporate CEM into their long-term plans/vision/mission to help achieve its objectives and goals
2. **Governance** describes the formal policy around the CEM program: Rules, Roles, Requests
3. **Business** Process Integration involves embedding CEM processes/data into other business operations
4. **Method** addresses the means by which customer feedback is collected and what gets measured
5. **Reporting** addresses analysis, synthesis and dissemination of customer feedback
6. **Research** is concerned with how companies provide additional customer insight by conducting deep dive research using different types of customer data

Figure 3. Components of Customer Experience Management



The report by Hayes (2012) also presents Key CEM best practices. [12] These include:

1. Start with the Executives

- *Incorporate a customer-focus in the vision/mission statement.* Support the company mission by presenting customer-related information (e.g., customer satisfaction/loyalty goals) in the employee handbook. Use customer feedback metrics to set and monitor company goals.
- *Identify an executive as the champion of the CEM program.* A senior level executive “owns” the customer feedback program and reports customer feedback results at executive meetings. Senior executives evangelise the customer feedback program in their communication with employees and customers. Senior executives receive training on the customer feedback program.

- *Use customer feedback in decision-making process.* Include customer metrics in company's balanced scorecard along with other, traditional scorecard metrics. This practice will ensure executives and employees understand the importance of these metrics and are aware of current levels of customer satisfaction/loyalty. Present customer feedback results in company meetings and official documents.

2. Collect Customer Feedback

- *Conduct an annual / bi-annual customer survey.* While loyalty leaders collect customer feedback using a variety of sources (e.g., relationship survey, transactional survey, web survey social media), a good start would be to start with a relationship survey conducted annually/bi-annually. See the section on Customer Relationship Diagnostic below to learn about what to ask in your survey.
- *Measure different types of customer loyalty.* Selecting the right mix of customer loyalty questions will ensure you can grow your business through new and existing customers. Determine the important customer loyalty behaviors (retention, advocacy, purchasing) and measure them.
- *Use automated (e.g., Web) tools to collect and report customer feedback metrics.* Web tools not only facilitate data collection, but with the ever-increasing adoption of a Web lifestyle, they are also becoming a necessity. Data collection via the Web is cost-effective, allows for quick integration with other data sources and speeds reporting of customer feedback. There are several free survey services you can use to start collecting customer feedback: SurveyMonkey, Zoomerang. While these free services provide reports, they do not allow you access to the raw data. Also, you might consider using Limesurvey, an open-source, enterprise-quality survey engine; Limesurvey allows you to access your raw survey data.

3. Share Feedback Results Company-wide

- *Share customer feedback program results throughout the company.* Use Web-based reporting tools to allow easy access to the results by all employees. Regularly publish customer feedback results to all employees via emails/reports.
- *Use simple statistics to convey results and try to incorporate something visually interesting about the results.* Avoid sharing complex results with employees that might confuse them rather than educate them. Use simple statistics like means and frequencies. Avoid using difference scores (e.g., commonly called net scores) as they are ambiguous and unnecessary. Consider using visually stunning ways to present your data. A visually stunning presentation of the data, compared to bar graphs, will more likely be examined by the consumers of your reports.

Table 6. Best Practices in Strategy/Governance

Best Practices
<ul style="list-style-type: none"> ▪ Incorporate a customer-focus in the vision/mission statement Support the company mission by presenting customer-related information (e.g., customer satisfaction/loyalty goals) in the employee handbook. Use customer feedback metrics to set and monitor company goals.
<ul style="list-style-type: none"> ▪ Identify an executive as the champion of the customer feedback program A senior level executive “owns” the customer feedback program and reports customer feedback results at executive meetings. Senior executives evangelise the customer feedback program in their communication with employees and customers. Senior executives receive training on the customer feedback program.
<ul style="list-style-type: none"> ▪ Incorporate customer feedback as part of the decision-making process Include customer metrics in company's balanced scorecard along with other, traditional scorecard metrics. This practice will ensure executives and employees understand the importance of these metrics and are aware of current levels of customer satisfaction/loyalty. Present customer feedback results in company meetings and official documents.
<ul style="list-style-type: none"> ▪ Use customer feedback metrics in incentive compensation for executives and front-line employees Use key performance indicators and customer loyalty metrics to measure progress and set performance goals. Ensure these measures can be impacted by employee behaviour. Where possible, use objective business metrics that are linked to customer satisfaction as key performance indicators on which to build employee incentive programs (see Applied Research).
<ul style="list-style-type: none"> ▪ Build accountability for customer satisfaction/ loyalty goals into the company Incorporate customer feedback metrics into key performance measures for all employees. Include customer-

centric goals in the company's performance management system/processes. Employees set customer satisfaction goals as part of their performance objectives.

Example #3 – Customer Experience Barometer

KPMG. 2014. Customer Experience Barometer. KPMG International [9]

The focus of the KPMG report was to understand what was important to financial services customers and how organisations compare – not just to each other, but also against two other service-based sectors: utilities and e-retailers. To achieve this, they looked at individual brands across five countries to see how they were performing against the key elements of customer experience.

The key lessons they found that apply to almost any organisation operating in a service-based sector include:

1. **Keep your customers at the heart of your business:** Listen to your customers and respond to their needs.
2. **A customer-centered focus leads to improved customer lifetime value:** If you are passionate about your customers' experience, they will be passionate about you.
3. **Digital technology can transform the customer experience:** The most successful organisations consistently invest in improving their customer experience through digital solutions.
4. **You will be measured by the quality of your people:** Staff who promote trust are knowledgeable and deliver outstanding service will be essential.

The customer experience barometer used in the report was designed to provide a simple means of measuring, tracking and benchmarking the customer experience [9].

Figure 5 represents the 30 customer experience attributes that were assessed to determine the relationship between importance and performance of attributes. In using the tool the results from 160 organisations (which included 5,000 consumers spread equally across five major markets: Australia, China, Germany, the UK and the US in five different industries: banking, general insurance, life insurance, utilities, e-retail) that were included in the report [9] reported two key findings:

- Appearance of a website is an attribute of relatively low importance and performance. However, the performance score is higher than the importance score.
- Staff who are honest and tell the truth is an attribute of relatively high importance and relatively high performance. However, the importance score is significantly greater than the performance score, indicating a large gap in performance.

It was worthwhile to note that the results show that in the five industries surveyed, "value of money" and "staff who are honest and tell the truth" consistently scored highest in levels of importance to customers among the other attributes [9].

Figure 4. Customer Experience Attributes

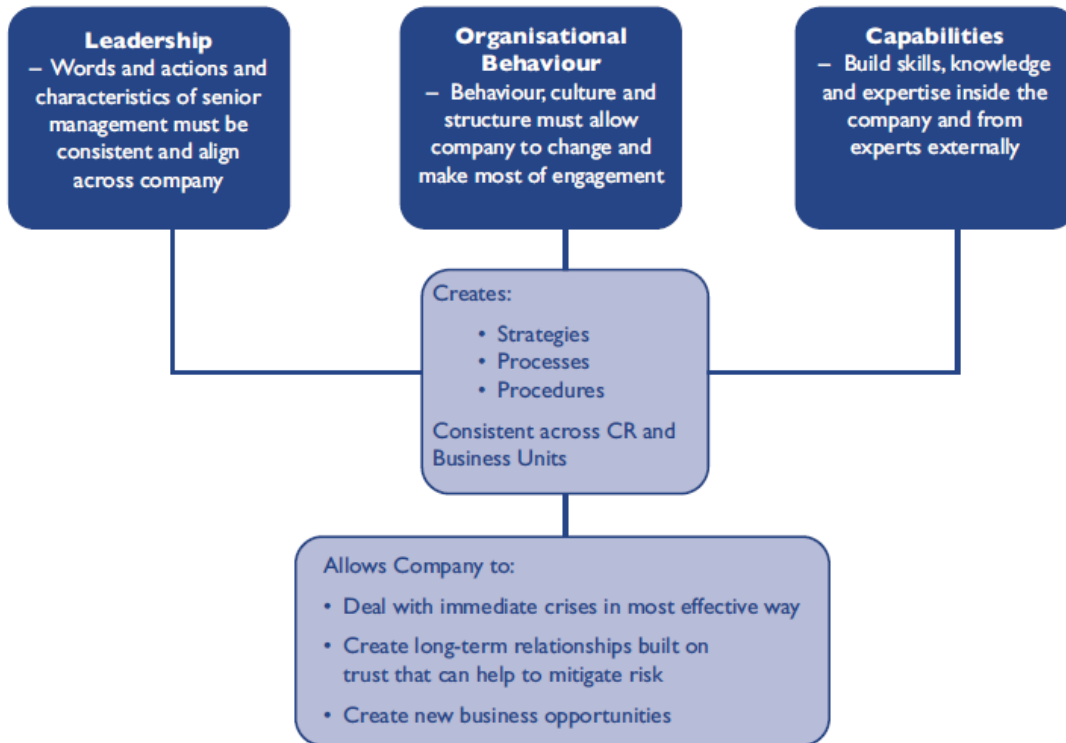
1	Accessibility	<ul style="list-style-type: none"> • the choices/options available for contacting a provider • the physical proximity/ease of access of a company • availability of services (around the clock) • the appearance and operation of a website (including navigation) • the ambience or decor of a bank, office, store.
2	Ease of doing business	<ul style="list-style-type: none"> • having services and products that are easy to understand • ease of getting issues/queries/complaints resolved • ability to get in contact with the company with short wait times.
3	Executorial excellence	<ul style="list-style-type: none"> • speed of making an inquiry/transaction • getting things right the first time • consistency of service – continuity in communications or interactions • speed when resolving a complaint/resolving a query • speed of service.
4	Personalized offering	<ul style="list-style-type: none"> • rewards my loyalty • offers products and services that can be tailored to my specific needs • rewards my choice to do business with the company.
5	Staff engagement	<ul style="list-style-type: none"> • staff who consistently follow through on their promises • staff with a positive attitude • staff who are knowledgeable • quality of advice and service offered • staff who are honest and tell the truth.
6	Value for money	<ul style="list-style-type: none"> • value for money (i.e. fair and appropriate fees and charges) • availability of rewards and promotions.
7	Brand value and reputation	<ul style="list-style-type: none"> • a brand that inspires me • a company that is well regarded in the media • a company I know will deliver • a company that puts the consumer first • trust in the brand to do the right thing • trust that the brand understands my needs • trust that the brand delivers on its promises.

Example #4 – Internal Elements critical to building meaningful Stakeholder Engagement

Stakeholder Engagement: A Road Map to Meaningful Engagement (#2 in the Doughty Centre ‘How to do Corporate Responsibility’ Series) [5]

Within the report compiled by the Doughty Centre [5] a flow diagram presenting the internal elements critical to building meaningful stakeholder engagement is provided (see Figure 2). The purpose of the flow diagram is to outline how each element (Leadership, Organisational Behaviour and Capabilities) play a complementary role in assisting the organisation to progress to a position where meaningful engagement with stakeholders is achievable [5].

Figure 5. Internal Elements Critical to Building Meaningful Stakeholder Relations



Example #5 – Process for Meaningful Engagement

Stakeholder Engagement: A Road Map to Meaningful Engagement (#2 in the Doughty Centre ‘How to do Corporate Responsibility’ Series) [5]

“Stakeholder engagement implies a willingness to listen; to discuss issues of interest to stakeholders of the organisation; and, critically, the organisation has to be prepared to consider changing what it aims to achieve and how it operates, as a result of stakeholder engagement” [5].

The Doughty Centre, School of Management illustrated the process for meaningful stakeholder (customer) engagement in Figure 3 below.

Figure 6. Process flow of stakeholder (customer) engagement

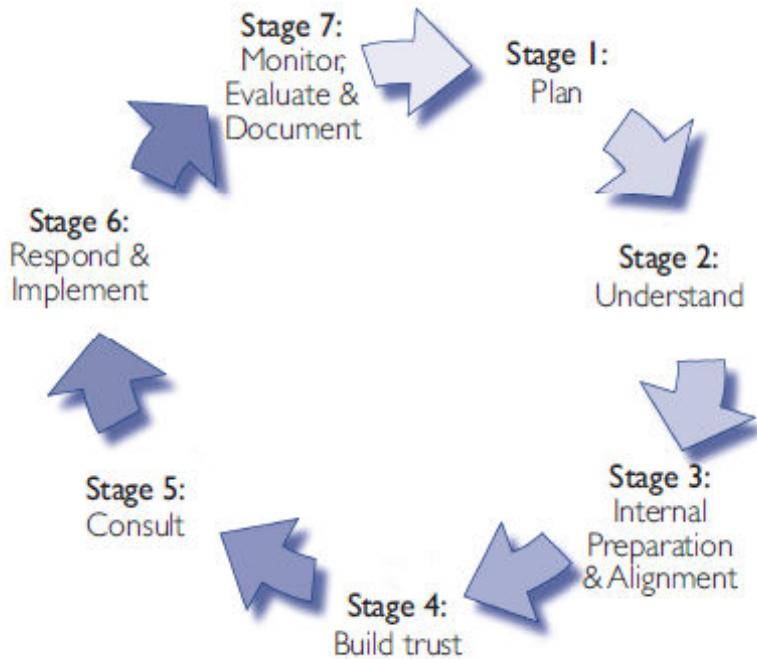


Table 7. Explanation of the stages in the process

Explanation of the stages in the process	
Stage 1:	<i>Planning:</i> Identify your basic objectives, issues to address and the stakeholders you prioritise as critical to your organisation.
Stage 2:	<i>Understand your stakeholders:</i> Identify the urgency they feel for their issues, the legitimacy of their interest and the power they have to impact on your organisation. Understand their wants and needs and how this correlates with your wants and needs from them. Having an understanding of their motivation, objectives and issues, and which of those are your issues, will help with profiling the priority stakeholders. (Profiling will help later when designing engagement and consultation tactics.)
Stage 3:	<i>Preparing internally to engage:</i> Dedicate appropriate time and resources to identify possible commonalities between your organisation and your stakeholders – to identify possible ways into conversations and win-win situations. Agree the commitment your organisation will give to stakeholder engagement and the process, which may mean building the business case and identifying internal advocates.
Stage 4:	<i>Building trust:</i> Different stakeholders will come with different levels of trust and willingness to trust. Recognise this and that how you interact with them will need, therefore, to adapt to the level of trust present and needed.
Stage 5:	<p><i>Consultation:</i> For overall success it is important to achieve during consultation:</p> <ul style="list-style-type: none"> ▪ Fair representation of all stakeholders, not just the easy ones ▪ Be responsive by providing information and proposals that respond directly to their expectations and interest previously identified, not just information responding to your internal objectives and

	<p>activities.</p> <ul style="list-style-type: none"> ▪ Contextualise information so that stakeholders get a detailed, holistic picture. ▪ Provide complete background information stakeholders need to draw fair and reasonable conclusions. ▪ Be realistic in negotiations with possible trade-off of expectations, needs and objectives. This will help achieve agreement and build trust. ▪ The consultation process should be material to your organisation's key economic, social and environmental risks. The mechanism of consultation includes personal interviews, workshops, focus groups, public meetings, surveys, participatory tools and stakeholder panels. Choose relevant mechanisms for each stakeholder group as one template won't fit all. Prioritise issues from your and the stakeholders' viewpoint, understanding the stakeholders' issues of importance.
Stage 6:	<p><i>Respond and implement:</i> Decide on a course of action for each issue agreed upon – understanding possible stakeholder reactions to your proposal will help you to develop a more successful proposal of action. How you respond is critical and a perception of fairness can drive success. A process is provided offering guidance on how to implement measures for the agreed issues identified.</p>
Stage 7:	<p><i>Monitor, evaluate and document:</i> Knowledge management is critical for capturing information and sharing what is learned. Transparency of the process is greatly aided by accurate documentation, especially if your organisation reports on stakeholder engagement or submits to external scrutiny. Remember to report back to stakeholders on progress, in a form and language appropriate to them. Collect a wide range of views to assess success and learning points of the engagement process, especially to understand cost-benefit – including benefits such as reputation, risk management and new business models.</p>