Quest for Facilities A4 – Customer Delivery and Insights Guidance Notes

Focus:	The module focuses on understanding and improving the customer journey by collecting and using real-time feedback, analysing NPS and retention data, and delivering personalised and inclusive services that enhance satisfaction and engagement.

Key elements:

- Customer journey and experience
- Real-time feedback collection and use
- Net Promoter Score (NPS) and retention data
- Personalisation and inclusive service delivery.

Best Practice Examples

- Embedding a Customer-Centred Culture: Delivering excellent customer experiences is fully embedded in the facility's culture. Staff understand the importance of every touchpoint and are trained and empowered to deliver consistently high-quality service. Customer satisfaction, retention, and engagement are core priorities, not optional tasks.
- Structured Customer Journey Planning: The customer journey is clearly mapped and planned, covering every stage from initial contact to ongoing participation. Touchpoints are designed to be intuitive, inclusive, and consistently high standard. Plans are reviewed regularly to adapt to changing customer needs and expectations.
- Comprehensive Staff Training and Development: Staff receive structured training on customer service, including face-to-face workshops, role play, scenario-based exercises, and induction sessions. Ongoing development is supported by coaching, refresher training, audits, and mystery visits. Staff understand their role in delivering an excellent customer journey and are empowered to take ownership of service quality.
- Proactive Measurement and Review: Customer service delivery is systematically measured and reviewed using multiple methods such as surveys, real-time feedback, NPS, retention data, audits, and mystery visits. Findings are analysed to identify trends, inform improvements, and ensure services remain responsive to customer needs.
- Using Feedback and Insight to Drive Improvement: Feedback and insights from customers are actively collected, analysed, and acted upon. Improvements are evidence-based and measurable, resulting in better experiences, higher satisfaction, and increased retention. Staff are engaged in interpreting insights and implementing service enhancements.

Quest for Facilities A4 – Customer Delivery and Insights Guidance Notes

Best Practice Examples (continued…)

- Inclusive and Personalised Service Delivery: Services are accessible, equitable, and responsive to all users, including underrepresented or inactive groups. Personalisation and inclusivity are embedded in communication, programming, and service delivery, ensuring every customer feels valued and supported.
- Effective Communication and Promotion: Services, customer journeys, and improvements are clearly communicated across multiple channels, including on-site displays, website, social media, and email. Communication strategies target both new and existing customers to drive engagement, retention, and growth.
- Measurable Impact and Recognition: Improvements to customer delivery result in tangible, organisation-wide benefits: increased satisfaction, stronger retention, higher NPS, and more inclusive service experiences. Achievements are recognised and celebrated, reinforcing a culture of continuous improvement and staff engagement.
- Integration with Industry Best Practice: Practices align with recognised customer service and experience standards, sector guidance, and evidence-based insights. Facilities benchmark performance against national standards, adopt innovative approaches, and continuously refine delivery to meet evolving customer expectations.
- Staff Engagement and Ownership: Staff at all levels are fully involved in customer delivery planning, measurement, and improvement. Ownership of processes ensures sustained high-quality service, proactive problem-solving, and a culture of accountability and pride in service excellence.

Quest for Facilities A4 – Customer Delivery and Insights Guidance Notes

PLAN	
Challenge: What plan is in place to deliver a customer journey that ensures all customers consistently receive an exemplary experience?	
Unsatisfactory	• No plan exists for managing the customer journey • Customer experience is inconsistent and unmonitored • Feedback is rarely collected or acted on.
Satisfactory	• A basic plan exists for some parts of the customer journey • Staff are aware of it, but it is inconsistently applied • Some customer feedback is collected, but it is not routinely used to improve services.
Good	• A clear plan is in place covering the full customer journey • Staff are trained and understand their roles in delivering a good experience • Customer feedback is collected regularly and used to inform improvements.
Very Good	• A comprehensive plan covers every stage of the customer journey • Staff are fully trained, empowered, and supported to deliver excellent service • Feedback, retention data, and NPS are used to adapt and improve services • Improvements are monitored and communicated to staff and customers.
Excellent	• Customer journey planning is fully embedded in organisational culture • Every customer touchpoint is designed for a consistently excellent experience • Feedback, NPS, and retention data are systematically analysed and acted upon • Staff at all levels are engaged in maintaining and improving customer experience • Outcomes are measured, reported, and celebrated internally and externally.

Quest for Facilities A4 – Customer Delivery and Insights Guidance Notes

DO	
Challenge: How are staff trained, developed and supported to consistently deliver high standards of customer service?	
Unsatisfactory	• No training or support is provided for customer service • Staff are unaware of expectations and deliver inconsistent experiences.
Satisfactory	• Some basic training is provided, but it is inconsistent or limited • Staff understand some expectations, but gaps remain in service quality.
Good	• Staff receive structured training on customer service, including face-to-face sessions • Role play and practical exercises are used to develop skills • Staff performance is monitored through informal observation or occasional audits.
Very Good	• Customer service training is comprehensive and delivered consistently across all staff • Face-to-face sessions, role play, and scenario-based exercises are included • Audits, mystery visits, and feedback are used to assess and improve performance • Staff are supported with ongoing coaching, development, and refresher sessions.
Excellent	• Customer service training is fully embedded into induction, ongoing development, and culture • All staff are trained using face-to-face workshops, role play, and scenario-based exercises • Performance is regularly monitored through audits, mystery visits, and customer feedback • Staff contribute ideas, take ownership of service standards, and continuously improve practice • Outcomes are measured, reported, and celebrated, demonstrating consistently high-quality customer experiences.

Quest for Facilities A4 – Customer Delivery and Insights Guidance Notes

DO	
Challenge: How are feedback and insights collected to improve the delivery of customer service?	
Unsatisfactory	• No feedback or insights are collected from customers • Customer service improvements are rarely or never informed by customer experience.
Satisfactory	• Some feedback is collected occasionally, such as informal comments or basic surveys • Insights are limited and only partially inform service improvements.
Good	• Regular feedback is collected using surveys, suggestion boxes, or online channels • Insights are analysed and shared with staff to inform service improvements • Key performance measures, such as Net Promoter Score (NPS) or retention data, are monitored occasionally.
Very Good	• Feedback is collected systematically from multiple channels, including face-to-face, digital surveys, and observation • Insights are analysed regularly to identify trends and inform operational changes • NPS, retention, and other customer data are reviewed and used to guide decisions • Staff are informed and involved in applying improvements based on feedback.
Excellent	• Feedback and insights are fully embedded into organisational culture and service delivery • Real-time feedback, surveys, NPS, retention, and other data are continuously monitored and analysed • Staff at all levels actively contribute to interpreting insights and implementing changes • Improvements are evidence-based, measurable, and aligned with organisational goals for customer satisfaction, retention, and inclusion • Positive outcomes and improvements are communicated to staff and customers, reinforcing engagement and accountability.

Quest for Facilities A4 – Customer Delivery and Insights Guidance Notes

DO	
Challenge: How are the customer journey and services communicated and promoted to attract new customers and retain existing customers?	
Unsatisfactory	• Customer journey and services are not clearly communicated or promoted • Few or no efforts are made to attract or retain customers • Existing customers receive inconsistent communication.
Satisfactory	• Basic information about services is available • Some communication channels are used, but promotion is limited • Customer retention efforts are occasional and inconsistent.
Good	• The customer journey and services are clearly communicated across multiple channels, such as website, social media, email, and on-site displays • Promotions target both new and existing customers • Feedback is used occasionally to refine communications and offers.
Very Good	• Customer journey and services are actively promoted across all relevant channels. • Communication is clear, consistent, and targeted to different customer groups. • Marketing and communication strategies support retention and growth. • Feedback, NPS, and usage data are used to improve messaging and engagement.
Excellent	• Communication and promotion are fully integrated into organisational strategy • All customers, including underrepresented groups, receive clear, timely, and personalised information • Marketing and communications are evidence-based, regularly monitored, and adapted to maximise acquisition and retention • Staff are trained to communicate effectively, and improvements in customer engagement and loyalty are measured and celebrated.

Quest for Facilities A4 – Customer Delivery and Insights Guidance Notes

MEASURE AND REVIEW	
Challenge: How do you measure and review the quality of customer service delivery?	
Unsatisfactory	• No measures or reviews are in place • Customer service quality is not monitored, and issues are only noticed when complaints arise.
Satisfactory	• Some basic measures are in place, such as occasional feedback or informal observation • Reviews are irregular and only cover parts of the service • Staff are rarely informed of findings
Good	• Customer service quality is regularly measured using tools like surveys, comment cards, or digital feedback • Reviews are conducted periodically and findings are shared with staff • Some improvements are made based on the insights collected.
Very Good	• Multiple channels are used to measure service quality, including surveys, feedback kiosks, NPS, and observation • Reviews are systematic, cover all areas of service, and identify trends • Insights are used to adapt services, and staff are engaged in implementing improvements.
Excellent	• Customer service quality measurement and review are fully embedded and continuous • Real-time feedback, NPS, retention data, audits, and observations are systematically analysed • Findings drive evidence-based improvements across the organisation • Staff at all levels are actively involved, and outcomes are monitored, reported, and celebrated.

Quest for Facilities A4 – Customer Delivery and Insights Guidance Notes

IMPACT	
Challenge: What impact have your changes to customer service delivery had over the last year?	
Unsatisfactory	• No evidence of improvement is seen • Customer experience, satisfaction, and retention remain unchanged or have declined.
Satisfactory	• Some improvements have been made, but their impact is limited or only visible in a few areas • Evidence is informal or anecdotal.
Good	• Improvements have led to noticeable positive changes in customer experience, satisfaction, or retention • Evidence is recorded, shared with staff, and used to make some further adjustments.
Very Good	• Improvements have had measurable impact across multiple areas, such as increased satisfaction, better retention, or smoother service delivery • Staff are aware of the changes and contribute to sustaining them • Insights from feedback and data are used to make ongoing improvements.
Excellent	• Improvements have led to clear, organisation-wide positive impact on customer experience, satisfaction, retention, and engagement • Evidence demonstrates measurable benefits and is regularly monitored • Staff actively participate in maintaining and improving customer delivery • Achievements are celebrated internally and externally, reinforcing a culture of continuous improvement.