Adaa

The National Center for Performance Measurement

Beneficiary Experience Methodology

The National Center for Performance Measurement

November, 2019

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Introduction

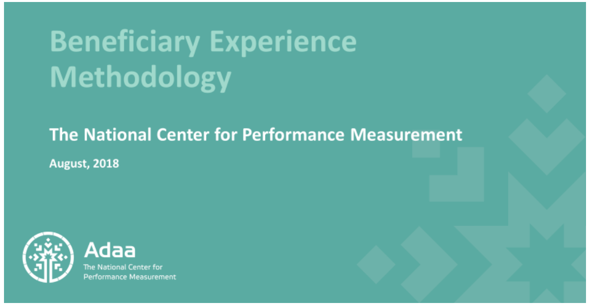
The objective of measuring beneficiary experience (BEX) and publishing beneficiary experience reports is to support the continuous improvement of public services, through identifying key challenges and improvement opportunities from the perspective of the beneficiary. Publishing beneficiary experience reports would also enable increased transparency with related stakeholders including government stakeholders and the general public.

The National Center for Performance Measurement, Adaa, established as an independent government body, founded on the 6th of Muharram 1437H, as approved by the Council of Ministers, has a key component of its mandate around supporting the process of developing public services by measuring the quality of services and beneficiary satisfaction. To support and enable this mandate, this Beneficiary Experience Methodology was developed, and shall be adopted by the Center to measure beneficiary satisfaction with public services across the kingdom and publish reports accordingly.

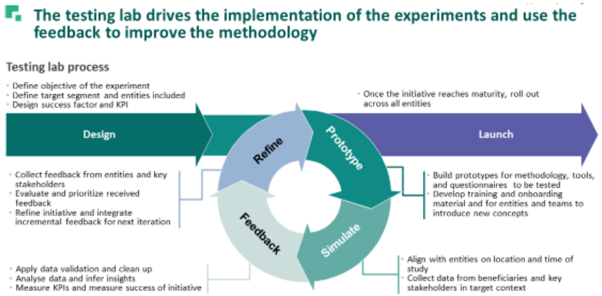
This Beneficiary Experience (BEX) Methodology sets guidelines based on leading practices, for each of the stages of beneficiary experience measurement, from planning to publishing the reports, for the methods of Satisfaction Surveys, Mystery Shopping and Focus Groups.

Updates

The following document is an update of the BEX methodology approved by Adaa's board in 2018



To include the enhancements piloted in the testing lab during the BEX strategy refresh



The main update to the document have been centered around four key themes:

Comprehensive beneficiary experience perspective:

Experience is addressed as a combination of satisfaction and service quality, with the combination of all VOB into a single Beneficiary Experience report per journey/entity, with the potential to be linked to Vision 2030 initiative reports

The process for the integration of responses from different channels is detailed to increase data richness and insight

Beneficiary centricity:

The methodology focuses on the macro-journey and sub-journey dimensions, with the potential for ad-hoc entity reports

Targets are set based on the journey nature and intrinsic beneficiary satisfaction

Improvement area and root cause identification:

The hotspot identification allows to pin point high-impact improvement areas

The root cause analysis helps identify drivers and sub-drivers to be addressed to improve the beneficiary experience

Entity enablement:

the methodology contemplates the participation of mature entities in the measurement of macro-journeys

Objectives of the Methodology

- Establish a standardized and unified methodology in beneficiary experience measurement aligned with leading practices.
- Drive the measurement of beneficiary experience through the provision of comprehensive guidelines.
- Prepare and publish beneficiary experience report to related stakeholders.
- Support the development of adequate beneficiary experience capabilities across the KSA government.
- Enable the adoption of innovative practices around beneficiary experience measurement.

Targeted Audience of the Methodology

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Adaa's Beneficiary Experience (BEX) Department, responsible for measuring and reporting on Beneficiary Experience on a periodic basis in alignment with this methodology

Government Entities

KSA's related government entities who will be responsible for providing input and support as required to Adaa's BEX Department to ensure the adequate execution of the methodology

Glossary (1/3)

BEX Methodology	A manual that provides a foundational knowledge to beneficiary experience, comprehensive guidelines around the measurement of beneficiary experience for selected voice of beneficiary methods, and a governance model with the roles of each related stakeholder
Beneficiary Experience	The cumulative perception and emotions of a beneficiary generated from single or multiple interactions with the Public Entities on the quality of the service
Strategic Objectives	Refers to specific long-term goals or focus areas of an initiative, or entity, and which should be achieved in a given timeframe
Macro-Journey	Refers to a series of interactions between a beneficiary and one or more government sector entities, consisting of one or more services, with the purpose of achieving an outcome that will significantly impact the beneficiary's life
Sub-Journey	Refers to a series of interactions specific to a beneficiary segment and one or more government sector entities, consisting of one or more services, with the purpose of achieving an outcome, that may differ from other beneficiary segments pursuing the same outcome
Beneficiary	Beneficiaries of government services including individuals (citizens, residents, and visitors), private sector businesses, government entities, and government employees
Beneficiary Segments	Groups of beneficiaries defined by similar characteristics such as age, gender, ethnicity, nature of service consumption or others

Glossary (2/3)

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Scope	Defines the coverage of the method across services, channels, beneficiary segments and geographic locations
Channels	Defines the means available to a beneficiary to inquire about or receive a government service; channels can be categorized into physical (e.g., physical facilities), digital (e.g., website, mobile application) or call center
Central Government	Refers to Saudi Arabia's Central Bodies including the Council of Ministers, and the Council of Economic and Development Affairs (CEDA)
Public entity	The governing body that owns the service delivery model, and the authoritative power to deliver a public services to specific beneficiary segment or general public through one or multiple delivery channels
Service	Process of supplying a function, a commodity, or a facility to specific beneficiary segment or general public
Service center	Team responsible of providing a service through implementing the service delivery model designed and communicated by respective entities
Voice of Beneficiary (VOB Methods)	Methods used to capture the beneficiary's feedback on their perception of different aspects of government services

Glossary (2/3)

Satisfaction Surveys	A voice of beneficiary method that captures quantitative beneficiary feedback through either interviewer-led sessions or self-administered surveys or phone applications. The objective is to quantify and compare beneficiary satisfaction levels across multiple services, drivers, and demographic dimensions
Mystery Shopping	A voice of beneficiary method that evaluates compliance of the service with set quality standards. It involves engaging with trained evaluators that observe key aspects of a service and factually report on every aspect of their experience
Focus Groups	A voice of beneficiary method that involves conducting a deep-dive on the beneficiary pain points as well as service improvement initiatives, through group discussions with beneficiary segments 'focused' around particular service dimensions
Quality Assurance	Corresponds to a set of checks conducted at various stages of the BEX methodology to ensure the set requirements are met
Sub-Driver of Satisfaction	Refers to a driver of satisfaction (such as Employees) that is broken down further into its sub-components (e.g. staff behavior or staff know-how)
Satisfaction Score (CSAT)	A calculation that highlights the satisfaction score of beneficiaries with a particular dimension, and is calculated by including the share of beneficiaries who were satisfied or very satisfied divided by the total number of beneficiaries
Compliance Score	A metric measured through the Mystery Shopping method indicating the level of compliance achieved with the defined service standards

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Beneficiary Experience Definition

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Beneficiary Experience Definition

The **cumulative perception** and **emotions** of a beneficiary generated from single or multiple **interactions** with the **Public Entities** on the **quality of the service**

Staff Interactions

Service Center

Call Center

Email

Beneficiary

- Request for facilities provision
- Pay Utility Bills
- Apply for a job
- Apply for Marriage certificate
- Renew trade license
- File a Complaint
- Register Agency
- Apply for Student Scholarship

Website

Social Media

Mobile App

Digital Chanel Interactions

Drivers and Benefits of Providing an Improved Beneficiary Experience

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Government

Rising Beneficiary Expectations

Beneficiaries are **increasingly demanding improved levels of service experience** based on their previous experiences with **that of leading organizations from the private or public sectors**

Growing Global Competitiveness

Efficiency of government services is an ever growing agenda item with the world's developing and developed countries, pushing nations to follow suit

Increasing Social Media Activism

Beneficiaries are now more **aware of their rights** and are **empowered to voice opinions on social media**, further pushing government entities to provide superior beneficiary experiences

Beneficiary

Improved Beneficiary Trust

A **better beneficiary experience** will **increase the beneficiaries' trust** in the government

Enhanced Well-being

Well-being is driven by a number of factors, one of which is s **delivery of high quality government services**

Improved Perception of Service Costs

Delivery of high-quality services **improves the beneficiary's perception** of the costs associated with government services

SECTION CONTENT

2. Beneficiary Experience Foundation

2.1 Definition and importance of beneficiary experience

2.2 Common practices around beneficiary experience measurement

Stages of Service Delivery

Service Discovery

1

Understands what documents are required for the service by exploring different channels

Service Request

2

- Provides required information for the service through the specified channel
- Interacts with the government entity's channels, systems, and/or staff

Service Fulfillment

3

- Gets informed about application status
- Proactively follows-up with the entity or receives status updates directly from the entity

Service Delivery

4

- Receives final outcome and notification of service
- Provides feedback to government entity (which is used as an input by government entity for service improvement)

Engaging with beneficiaries and understanding their experiences is the most effective way for governments entities to evaluate their performance and identify opportunities for improvement throughout the beneficiary's journey

Voice of Beneficiary Definition and Stages

What is a VOB?

Voice of the Beneficiary is a **structured approach to listening and engaging with beneficiaries to gain their feedback** around the quality of government services and analyze the feedback **to inform business decision-making**

VOB provides government entities with **valuable insights into the aspects of a service that matter to beneficiaries** and **design** an **ideal beneficiary journey** accordingly

1. Plan
2. Measure
3. Analyze
4. Report
5. Improve

Voice of Beneficiary Measurements Stages

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Plan
1

Determine the scope of the VOB initiative, identify the VOB methods to be used, and develop an execution plan

Measure
2

Initiate the fieldwork for the selected method (e.g. satisfaction surveys, mystery shopping, focus groups) based on the defined scope of the VoB

Analyze
3

Gather all beneficiary feedback and conduct analysis to generate insights into beneficiary perception of services

Report
4

Develop reports highlighting the quantitative and qualitative findings with visualization and synthesis of the data

Improve
5

Develop an action plan to improve service delivery based on the beneficiary findings and monitor progress against plan

Success of Voice of the Beneficiary measurement hinges on setting a clear plan with defined objectives and focus areas

Impact of Expectations on Beneficiary Satisfaction Levels

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Perception

is subjective and is derived from the beneficiary's interaction with the product or service

Vs.

Expectation

is what the beneficiary expects, influenced by demographics, background experience with similar products and information available

Satisfaction

is the outcome of the beneficiary's **assessment of their perception** of a service **against his/her prior expectations**

Perception lower than Expectation

When expectation is higher than perceived experience, there is a **low level of satisfaction**

Perception higher than Expectation

When the perceived experience is higher than the expectation, there is a **high level of satisfaction**

Impact of Expectations on Beneficiary Satisfaction Levels

How Beneficiaries Perceive the Experience?

- Enjoyable
- Easy
- Met the Needs
- Hard
- Annoying, Degrading...

What are their expectations?

- Cultural Context
- Demographics
- Service Promises
- Previous Experiences

How did they feel?

- Very Satisfied / Delighted
- Satisfied
- Neither satisfied nor dissatisfied
- Dissatisfied
- Very dissatisfied

Governments and the private sector are moving from the Satisfaction Model to the Happiness Model (Customer Delight), with a high level of emotional and rational perception of the service

Classification of Voice of Beneficiary Methods

VoB methods can be classified into...

Quantitative Research Methods	Mixed Research Methods	Qualitative Research Methods
Captures the beneficiary's experience and feedback through the systematic collection of data in numerical format	Captures the beneficiary's experience and feedback through the collection of unstructured or structured data, in both numerical and textual format	Collects the beneficiary's experience and feedback through the collection of unstructured data in textual format

Measure and Rank — Typical Outcomes — Discover and Explore

VoB Methodologies

Quantitative Research

Survey Research

Interviewer-Led

- Telephone Surveys
- Face-to-Face Surveys

Self-Administered

- Web-based Surveys

Mixed Research

Mystery Shopping

Qualitative Research

Focus Group

Description of Selected Voice of Beneficiary Methods

Type	Method	Description
Quantitative	Interviewer-Led Telephone Survey Interviewer-Led Face-to-Face Survey Self-Administered Web-based Survey	A voice of beneficiary method that captures quantitative beneficiary feedback through either interviewer-led sessions or self-administered surveys. The objective is to quantify and compare beneficiary satisfaction levels across multiple services, drivers, and demographic dimensions
Mixed	Mystery Shopping	A voice of beneficiary method that evaluates compliance of the service with set quality standards. It involves engaging with trained evaluators that observe key aspects of a service and factually report on every aspect of their experience
Qualitative	Focus Groups	A voice of beneficiary method that involves conducting a deep-dive on the beneficiary pain points as well as service improvement initiatives, through group discussions with beneficiary segments 'focused' around particular service dimensions

Description of Selected Voice of Beneficiary Methods

	VoB Methods	Cost	Time	Effort
Quantitative	Interviewer-Led Telephone Survey	■■□□□	■■■□□	■■■□□
Quantitative	Interviewer-Led Face-to-Face Survey	■■■■□	■■■■□	■■■■■
Quantitative	Self-Administered Web-based Survey	■□□□□	■■■□□	■□□□□
Mixed	Mystery Shopping	■■■□□	■■■□□	■■■■□
Qualitative	Focus Groups	■■■■□	■■□□□	■■■□□

Quantitative Methods – Interviewer-led Telephone Surveying

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Interviewer Led Telephone Survey

Interview beneficiaries over the phone and capture quantitative beneficiary feedback to quantify and compare beneficiary satisfaction levels across multiple service and entity level dimensions

Objective

Collect reliable beneficiary satisfaction data, and derive overall satisfaction, demographic data and ratings on service quality dimensions

Key Steps

- Key questions are defined in alignment with objectives and compiled into a survey format.
- Contact list of beneficiaries is consolidated, to be leveraged by the interviewers.
- Interviewers contact respondents over the phone and conduct the interview, clarifying questions and logging answers.
- Responses are then consolidated and compiled into a quantitative dataset for analysis.

Relevant Benchmarks

US: Social Security Administration Satisfaction Survey

The US Social Security Administration ran a survey to gauge its customers' overall satisfaction across its field offices, phone lines and website, leveraging phone-based surveying interviews

Information that can be learned

- Overall beneficiary satisfaction rating with the services
- Satisfaction ratings per service dimensions (e.g. Staff, Timeliness, Digital Channels)
- Beneficiary profiles and segments using demographic data received through surveys

Information that cannot be learned

- Beneficiary attitudes towards the service or its key dimensions
- Motivations behind certain beneficiary behaviors or in-depth understanding of beneficiary emotions
- Detailed service consumption data (i.e. spend breakdown, touchpoints waiting time)

Cost

Time

Effort

Quantitative Methods – Interviewer-led Face-to-Face Survey

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Interviewer-led Face-to-Face Survey

Interview beneficiaries face to face and capture quantitative beneficiary feedback to quantify and compare beneficiary satisfaction levels across multiple service and entity level dimensions

Objective

Collect reliable beneficiary satisfaction data, and derive overall satisfaction, demographic data and ratings on service quality dimensions

Key Steps

- Key questions are defined in alignment with objectives and compiled into a survey format
- Beneficiary segments that would take part in the survey are defined
- Interviewers meet with respondents at service centers or other specified locations and conduct the interview, listing responses
- Responses are then consolidated and compiled into a quantitative dataset for analysis

Relevant Benchmarks

Ireland: Irish Civil Service Satisfaction Survey

As part of the Irish Civil Service Satisfaction program, the Department of Public Expenditure and Reform conducted a satisfaction survey, interviewing over 2000 respondents about their experience with civil services departments

Information that can be learned

- Overall beneficiary perception with service
- Overall beneficiary satisfaction rating with the services
- Satisfaction ratings per service dimensions (e.g. Staff, Timeliness, Digital Channels)
- Beneficiary profiles and segments using demographic data received through surveys
- Detailed service consumption data (i.e. spend breakdown, touchpoints waiting time)

Information that cannot be learned

- Beneficiary attitudes towards the service or its key dimensions
- Motivations behind certain beneficiary behaviors or in-depth understanding of beneficiary emotions

Cost

Time

Effort

Quantitative Methods – Self-Administered Web-Based Survey

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Self-Administered Web-based survey

Interview beneficiaries face to face and capture quantitative beneficiary feedback to quantify and compare beneficiary satisfaction levels across multiple service and entity level dimensions

Objective

Collect reliable beneficiary satisfaction data, and derive overall satisfaction, demographic data and ratings on service quality dimensions

Key Steps

- Key questions are defined in alignment with objectives and compiled into a survey format
- Survey is deployed online on a platform visible to beneficiaries, such as by mail, or an online panel
- Willing beneficiaries go through the survey and log in their responses, which are then consolidated automatically
- Consolidated dataset is then extracted and sent for further analysis and insight generation

Relevant Benchmarks

New South Wales, Australia Whole of Government Satisfaction Survey

The government of the New South Wales region in Australia conducts a regular whole of government customer satisfaction survey, contacting respondents using online self-administered surveys

Information that can be learned

- Overall beneficiary satisfaction rating with the services
- Satisfaction ratings per service dimensions (e.g. Staff, Timeliness, Digital Channels)
- Beneficiary profiles and segments using demographic data received through surveys

Information that cannot be learned

- Beneficiary attitudes towards the service or its key dimensions
- Motivations behind certain beneficiary behaviors or in-depth understanding of beneficiary emotions
- Detailed service consumption data (i.e. spend breakdown, touchpoints waiting time)

Cost

Time

Effort

Mixed Methods – Mystery Shopping

Mystery Shopping

Measure compliance of services with selected quality standards by hiring professional evaluators who act as customers, and factually report on every aspect of their experience

Objective

Validate service steps, and evaluate compliance of services and channels with a pre-defined set of quality standards

Key Steps

- Define the scope of the service being measured, outlining every step to be taken and the expected outcome for mystery shoppers to request
- Deploy the mystery shopper workforce to selected channels, to enact the role of beneficiaries and log details of the experience in qualitative or quantitative format
- Consolidate and refine data collected by mystery shoppers by reviewing logged information, readying it for further analysis

Relevant Benchmarks

UAE: Managing service quality using Mystery Shopping

The UAE has launched a program to control service delivery quality across service delivery centers of federal ministries and authorities using mystery shoppers, as part of its Service Excellence Program

Information that can be learned

- Service performance against accepted service delivery standards
- Evaluation of channels such as physical service centers, website, call center
- Customer service staff behavior

Information that cannot be learned

- Beneficiary satisfaction rating with the service
- Motivations behind certain beneficiary behaviors or in-depth understanding of beneficiary emotions

Cost

Time

Effort

Qualitative Methods – Focus Groups

Focus Groups

Capture beneficiary pain points as well as service improvement initiatives, through conducting group discussions with beneficiary segments 'focused' around particular service dimensions

Objective

Collect beneficiary satisfaction insights, to identify key pain points, prioritize service dimensions as well as explore attitudes and emotions experienced by beneficiaries

Key Steps

- Define the scope of the service being measured, outlining every step to be taken and the expected outcome for mystery shoppers to request
- Deploy the mystery shopper workforce to selected channels, to enact the role of beneficiaries and log details of the experience in qualitative or quantitative format
- Consolidate and refine data collected by mystery shoppers by reviewing logged information, readying it for further analysis

Relevant Benchmarks

New Zealand: Understanding the Relevance of Satisfaction Drivers

The government of New Zealand conducted focus groups with key beneficiary segments to better understand what characterizes their satisfaction and what impacts trust

Information that can be learned

- Key beneficiary pain points across service quality dimensions
- Beneficiary attitudes towards the service or its key dimensions
- Motivations behind certain beneficiary behaviors or in-depth understanding of beneficiary emotions

Information that cannot be learned

- Beneficiary satisfaction rating with the service
- Satisfaction ratings of service dimensions (Staff, Procedures, Physical Location, Timeliness, Digital Channel, Service Outcome)
- Beneficiary profiles and segments using demographic and consumption data

Cost

Time

Effort

Drivers of Satisfaction

Overview of Drivers of Satisfaction	Use of Drivers for VoB Methods	Benefits
• Drivers of satisfaction are **key determinants of satisfaction**, comprising of **essential aspects of a service that directly impact the beneficiary's experience** • Drivers of satisfaction allow **beneficiaries' perceptions of service quality to be measured** and **uncover aspects of the service** delivery **that fall below satisfactory levels**	• **In quantitative methods**, satisfaction against these drivers is captured using a numerical or ordinal scale to quantify the results • **Correlation coefficients** are calculated for each driver against the overall satisfaction to assess **what matters more to beneficiary** based on their **behavioral and demographic context** • **In qualitative methods**, drivers define the topics of discussion, probing respondents for their perception of key aspects of service quality that reflect their satisfaction	• Feedback on drivers of satisfaction help organizations direct efforts towards **service areas requiring transformation** (i.e. people, process, channels, features, service outputs) • This helps **prioritizing investments** in **specific service areas** that beneficiaries value the most • In addition, the drivers of satisfaction and their **weightage may be refined** to **reflect changes in beneficiary expectations**

Drivers of satisfaction are helpful in both quantitative and qualitative VoB methods and provide direction on the areas along the service journey that need to be tested

Drivers of Satisfaction for Government Services

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Procedures

Evaluates the availability and accuracy of information, as well as the ease for beneficiaries to obtain the service

Staff

Evaluates satisfaction with the staff know-how, and their level of courtesy

Timeliness

Evaluates the time spent by beneficiaries to obtain the service including the service processing time and the waiting time

Service Outcome

Assesses the quality of the service outcome and whether it is in line with the service promise

Channel

Assesses the quality of the channels, physical and digital (website, mobile application), based on appeal and accessibility

Types of Scaling Methods

… prompting beneficiaries by asking "Are you satisfied with the service"…

Dichotomous Scales

Respondents answer by selecting one of two options

YES NO

Y N

3-point Rating Scale

Respondents answer by selecting one of three options

Disagree Neutral Agree

1 2 3

5-point Rating Scale

Respondents answer by selecting one of five options

Strongly Disagree, Disagree, Undecided, Agree, Strongly Agree

1 2 3 4 5

10-point Rating Scale

Respondents answer by selecting one of ten options

Strongly Disagree, Moderately Disagree, Slightly Disagree, Undecided, …

1 2 3 4 …

Semantic Differential Scale

Respondents answer by setting the scale between two opposing attributes

Dissatisfied Satisfied

Beneficiary Satisfaction Indicators – CSAT, Customer Satisfaction

- CSAT is defined as the proportion of beneficiaries whose reported experience with a service or journey exceed specified satisfaction expectations
- It is typically used with a 5 point Likert scale and is calculated as the number of beneficiaries who scored 4 and 5, over the total number of respondents

Relevance to Govt. Sector

The CSAT method is a commonly used method in the public sector for measuring beneficiary experience

Outcome

CSAT

Customer Satisfaction

Relevance to Govt. Sector

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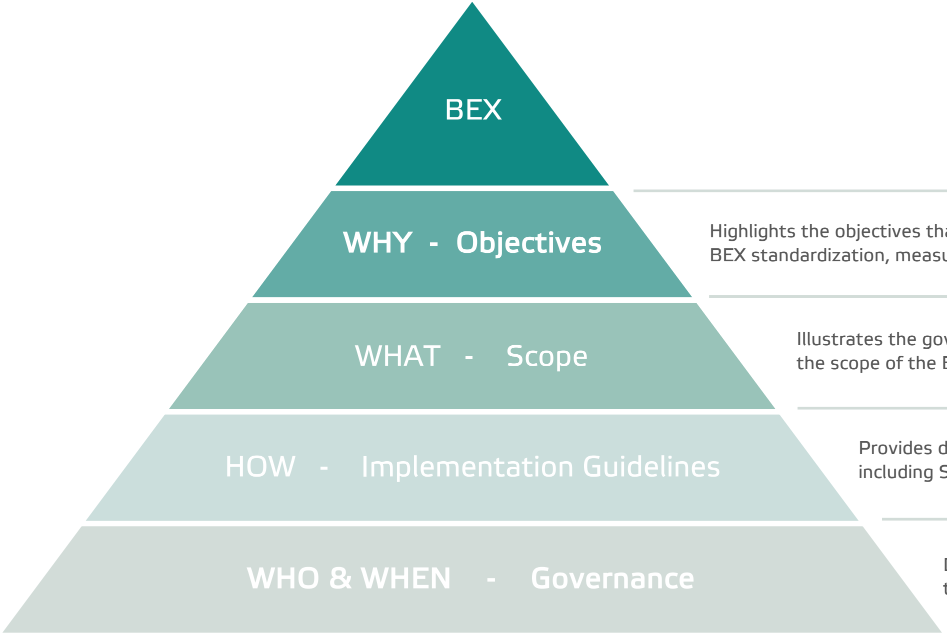
BEX Methodology Dimensions



Highlights the objectives that the BEX Methodology aims to achieve at a government level related to BEX standardization, measurement, capabilities, reporting, and innovation

Illustrates the government entities, beneficiaries, channels, and services, that are part of the scope of the BEX Methodology

Provides detailed guidelines on the steps to be completed for each of the VOB methods including Satisfaction Surveys, Mystery Shopping, and Focus groups

Details the role played by Adaa and other government entities to implement the BEX methodology, in addition to the reporting cycle for each VOB method

SECTION CONTENT

3. Beneficiary Experience Methodology Dimensions

BEX Methodology Objectives

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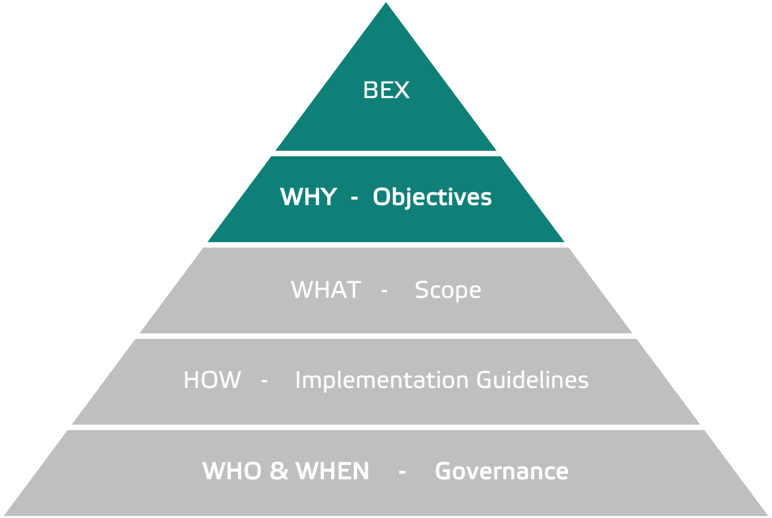

BEX Methodology Objectives

Four overarching objectives to measure beneficiary experience across the KSA government are defined – based on Adaa’s mandate and measurement pillars

BEX Methodology Objectives

Initialize the performance measurement of public entities

Support government performance management **decision making**

Improve the government maturity in the performance management

Achieve organizational maturity and **sustainability**

Adaa Measurement Pillars

1

To measure the realization of objectives and targets:

Key performance indicators (KPIs), primarily outcome-based KPIs, are used to evaluate entities progress towards achieving their mandated objectives and targets

2

To measure the realization of initiatives:

Public entities provide Adaa with vision related initiatives, Adaa then generates reports on the level of realizing milestones of initiatives, and outputs

3

To measure beneficiary satisfaction:

Different methods including surveys, mystery shopping, and focus groups, enabled by technology, are used to measure the quality of services provided by public entities

BEX related

BEX methodology contribution to Adaa's strategic objectives

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Adaa Strategic objectives

Initialize the **performance measurement** of public entities	**Improve the government maturity** in the performance management	**Support government** performance management **decision making**	Achieve organizational maturity and **sustainability**

1 . BEX Measurement

Drive the measurement of beneficiary experience through the provision of comprehensive guidelines

2 . Establish a Standardized BEX Methodology

Establish a standardized and unified methodology in beneficiary experience measurement aligned with leading practices

3 . Publish BEX Reports

Prepare and publish beneficiary experience report to related stakeholders

4 . BEX Capabilities & innovation

Support the development of adequate beneficiary experience capabilities and innovative practives across the KSA government

BEX Methodology Objectives

#	Strategic Objective		Synthesis
1	**BEX Standardization**	Establish a standardized and unified methodology in beneficiary experience measurement aligned with leading practices	The defined BEX Methodology would enable the adoption of a standardized approach to plan for and report on voice of beneficiary methods including Satisfaction Surveys, Mystery Shopping and Focus Groups, by BEX or mature public entities
2	**BEX Measurement**	Drive the measurement of beneficiary experience through the provision of comprehensive guidelines	Implementation of the guidelines for each of the selected VOB methods including Satisfaction Surveys, Mystery Shopping and Focus Groups, directly by BEX or through enabled public entities
3	**BEX Reporting**	Prepare and publish beneficiary experience report to related stakeholders	Adaa would collect and analyze beneficiary satisfaction results received and develop satisfaction reports illustrating the outcome to related internal and external stakeholders with an aim to support public services improvement
4	**BEX Capabilities & innovation**	Support the development of adequate beneficiary experience capabilities and innovation across the KSA government	Adaa would engage with entities to advise on their related beneficiary experience capabilities (e.g. technology, processes, templates, etc.) to adequately measure and report on their beneficiary satisfaction

SECTION CONTENT

3. Beneficiary Experience Methodology Dimensions

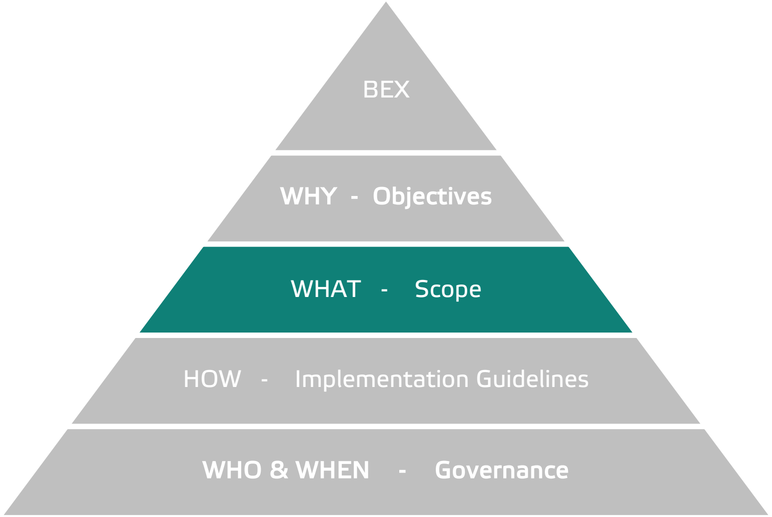
3.1 Why? – Objectives of the BEX Methodology

3.2 What? – Scope of the BEX Methodology

3.3 How? – Implementation Guidelines per VOB Method

3.4 Who & When? – Governance Model

BEX Methodology Scope



The scope of the BEX methodology defines what will be measured and reported on. Defining the scope of the methodology allows standard and effective utilization of resources.

The scope is defined across four components:

Beneficiary Segments

Sub-Journeys

Sub-Journeys

Channels

Entities

BEX Methodology Scope

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1

The scope of the methodology includes three types of beneficiary interactions:

- Government to Consumer (G2C)
- Government to Business (G2B)
- Government to Government (G2G)
- Government to Employee (G2E) – *(out of current scope)*

2

The sub-journeys to be reported on for beneficiary satisfaction are prioritized based on:

- Number of beneficiaries served
- Nature of the interaction (e.g. continuous, single transaction, lifetime event, etc.)
- Nature of the beneficiary (individual vs. corporation)

3

The services measured in a proactive way will belong to:

- A planned sub-journey
- Key journeys defined for specific entity reports under ad-hoc requests

4

The channels that would primarily be assessed include:

- Service Center (physical channel)
- Digital channel (website and mobile)
- Call Center

5

The target government entities involved in the adoption of the BEX Methodology include:

- Ministries
- General Authorities
- Funds
- Public organizations
- Independent government entities

Beneficiary Experience Measurement Scope Components

Beneficiary Level								Satisfaction is measured on the different beneficiary categories and segments…
Sub-Journey Level	Sub-Journey '1'			Sub-Journey 'n'				… that can live through different sub-journeys...
Service Level	Service 1	Service 2	Service 'n'	Service 1	Service '2	Service 3	Service 'n'	… composed of a series of services...
Channel Level	Channel 1			Channel 1		Channel 'n'		... that can be provided through different channels…
Government Entity Level	Entity 1		Entity 'n'	Entity 1		Entity 2	Entity 'n'	… by one or more public entities.

Target Beneficiary Categories for BEX Measurement

Current Scope

Beneficiary Categories

G2C	G2B	G2G	G2E
Government to Consumer (Beneficiary)	**Government to Businesses**	**Government to Government**	**Government to Employees**
Includes public services provided to individual segments of Saudi citizens, residents and visitors to the Kingdom	Includes public services provided to privately owned organizations including small, medium, and large businesses, and non-profit organizations	Includes public services provided to other government owned organizations	Includes public services provided to employees that are employed in the government
Examples of G2C services includes issuance of passport, issuance of driving license, etc..	Examples of G2B services include issuance of employee permits, issuance of Saudization certificate, etc..	Examples of G2G services include review and approval of the budget, processing of payments, etc.	Examples of G2E services include employee promotion, employee leave process, salary issuance, etc.

Target Sub-Journeys for BEX Measurement

Segmentation parameters

Analyze validated beneficiary data available to identify:

1. **Primary parameters** that fundamentally change beneficiary journey:

   E.g. Owner nationality, journey channel, etc.

2. **Secondary parameters** that partially impact beneficiary subgroups or partial journey phases:

   E.g. gender, region, etc.

Beneficiary segmentation

Illustrative

Ownership | Applicant Occupancy

- **Total (15K)**
  - Saudi & GCC (15.3K)
    - **Owner** (12.8K)
    - **Other** (2.5K)
  - Foreigner & Mixed Nationality (142)
    - **Owner** (84)
    - **Other** (58)

Segment prioritization

	Transaction volume	Strategic importance
Saudi & GCC Owner	P	P
Saudi &GCC Other	P	P
Foreign & Mixed Nat Owner		P
Foreign & Mixed Nat Other		

Beneficiary input

Phone interviews

Conducted 20+ phone interviews with **prioritized beneficiary** segment to collect **actual experience**

Target Government Services for BEX Measurement

Service Definition

A service comprises of a series of related procedures that are aimed to achieve a single defined outcome, and that is provided by a particular government entity to its beneficiaries, across its channels.

All services mapped for a selected sub-journey will be measured To select the services for ad-hoc entity reports, entities would conduct a service prioritization exercise

1 *Overall List of Entity Services*

Service 1

Service 2

Service 3

Service 4

Service n

2 *Selection & Prioritization of Services**

- Represents a **core service** of the entity
- Has a **high transactional volume** relative to the entity's other services
- Has a **high number of beneficiaries** relative to entity's other services
- Has a high **number of beneficiary complaints**

3 *Final List of Services*

Final list of services for measurement and reporting of beneficiary satisfaction

- Service 1
- Service 2
- Service 3
- Service n

Target Channels of Service Delivery for BEX Measurement

Physical Channel

Digital Channels

Phone Channel

Channels

Includes the measurement and reporting of beneficiary satisfaction on the channels in which public services can be initiated as an application and / or fulfilled

Represents the physical locations in which government entities provide their services. For some entities, it implies their Service Centers, while for other entities it implies their hospitals, schools, etc.

In selecting the physical channels, those with the highest transactional volume would be prioritized for measurement and reporting.

Represents the government entity's website and / or mobile application.

This channel would be assessed only for services in which the beneficiary can apply and / or fulfil the service in these digital channels.

Represents the government entity's call center.

This channel would be assessed for services in which the beneficiary can apply and / or fulfil the service in the call center.

Target Channels of Service Delivery for BEX Measurement

Ministries	General Authorities	Funds	Government Organization
Entities			
Ministry of Hajj and Housing	*Public Transport Authority*	*Human Resources Development Fund*	*General Organization for Social Insurance*
Ministry of Education	*Saudi Red Crescent Authority*	*Real Estate Development Fund*	*Saudia Airlines*
Amongst other Ministries..	*Amongst other Authorities…*	*Amongst other Funds…*	*Amongst other Entities..*

In addition to other related independent entities

Levels of BEX Measurement

PLANNED	**Macro-Journey Level Measurement**	• A list of country wide macro-journeys were defined, each of which comprise of multiple services and government entities. Beneficiary experience measurement is conducted on the overall macro-journey level with its entities and services included • This level of measurement is considered 'partial measurement' for the entities involved within the macro journey, where a report is generated on the journey level and shared with involved entities
AD-HOC	**Entity Level Measurement**	• Beneficiary satisfaction is measured on the level of a particular government entity, and the services provided by this entity • There are two options to generate entity reports: collection of services measured as part of macro-journeys or tailored measurement of main journeys provided by the entity • This level of measurement is considered 'full measurement' for the entity, where a report is generated and shared with the entity itself

Target Macro-Journeys for BEX Measurement

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Macro Journey Definition

A macro-journey is a series of interactions, with a defined start and end point, between a beneficiary and multiple public sector entities, consisting of two or more public services (which may be operated by the public or private sector), with the purpose of achieving a significant outcome or milestone relevant to the beneficiary's life.

Macro-Journeys: Based on a thorough multi-dimension analysis, 21 macro journeys were identified and divided into 8 categories
New macro-journeys to be added for the development of the National Satisfaction Index

Religion

1 Performing Hajj
2 Performing Umrah

Housing

5 Buying a home
6 Building a home
7 Receiving government housing benefits

Health

12 Receiving healthcare
13 Receiving emergency health services

Family

17 Getting married
18 Getting divorced
19 Dealing with death
20 Obtaining domestic worker sponsorship

Employment & Business

3 Starting a business
4 Receiving government support for employment

Education

8 Enrolling and receiving K-12 education
9 Enrolling and receiving higher and tertiary education
10 Receiving higher education scholarship
11 Enrolling and receiving special needs education

Transportation

14 Travelling by road
15 Travelling by air
16 Commuting within cities

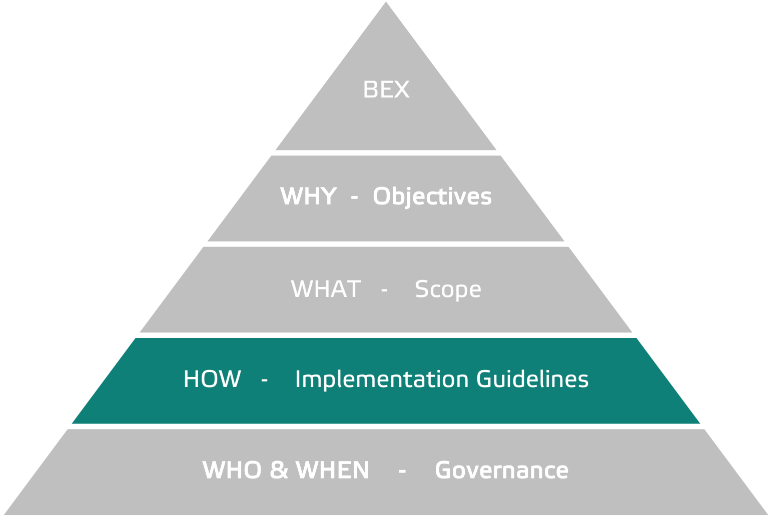
Justice

21 Dealing with court cases

SECTION CONTENT

3. Beneficiary Experience Methodology Dimensions

BEX Methodology Implementation Guidelines



The three voice of beneficiary methods to be adopted as part of this BEX Methodology include Satisfaction Surveys, Mystery Shopping, and Focus Groups.

Step-by-step implementation guidelines have been detailed for each method, which shall be followed to ensure a standard is followed that is aligned to leading practices.

Mystery Shopping

Satisfaction Surveys

Focus Groups

Introduction to VOB Methods

How do measurement tools complement each other?

Satisfaction Surveys

Measures the self-satisfaction of the beneficiary from the experience provided by the device from a quantitative perspective

Mystery Shopping

Assess the compliance of entity with service standards and verify the gaps in the service delivery procedures of the beneficiary
Can be substituted by collection of operational indicators

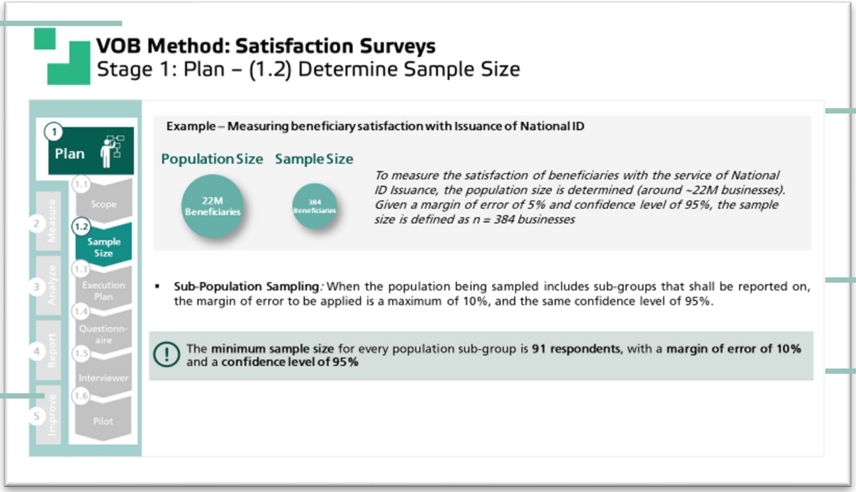
Focus Groups

Assess key service challenges and identify opportunities for service improvements from a qualitative perspective

Introduction to VOB Methods

In each slide, the main heading comprises of the name of the VOB Method, and the sub-heading refers to its relevant 'Stage' and 'Step' that is detailed

A tracker for the stages and steps of each method is found on the left-hand side of the each slide



Examples are provided in relevant areas across the 'Implementation Guidelines' to better explain key concepts to the reader

The content relevant to each step of the methodology is highlighted

Comment boxes with sign indicate key takeaways for the reader on the page

VOB Methods

Satisfaction Surveys

Measures the self-satisfaction of the beneficiary from the experience provided by the device from a quantitative perspective

Mystery Shopping

Assess the compliance of entity with service standards and verify the gaps in the service delivery procedures of the beneficiary
Can be substituted by collection of operational indicators

Focus Groups

Assess key service challenges and identify opportunities for service improvements from a qualitative perspective

Beneficiary Experience Reports

Satisfaction Surveys

Satisfaction Surveys

Measures the self-satisfaction of the beneficiary from the experience provided by the device from a quantitative perspective

Mystery Shopping

Assess the compliance of entity with service standards and verify the gaps in the service delivery procedures of the beneficiary

Can be substituted by collection of operational indicators

Focus Groups

Assess key service challenges and identify opportunities for service improvements from a qualitative perspective

Beneficiary Experience Reports

VOB Method: Satisfaction Surveys - Introduction

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Drivers of Satisfaction

- Procedures
- Staff
- Physical/ Digital Channel
- Timeliness
- Service Outcome

Measurement Objectives

Measure overall beneficiary satisfaction with the entity and its services

Identify the source of satisfaction or dissatisfaction

How often is it implemented?

Implemented in a periodic and systematic manner

Why is it used?

Used to determine source of beneficiary satisfaction or dissatisfaction and improvement areas and compare score trends over time

Who can do the research?

For face to face and telephonic, conducted by trained interviewers, and for online, conducted personally by the beneficiary

Key Steps

1 **PLAN:** Develop the survey approach, plan, onboard and prepare interviewers, and conduct a pilot

2 **MEASURE:** Implement and monitor the data collection exercise while conducting quality control measures

3 **ANALYZE:** Consolidate and cleanse the data and conduct analysis to derive insights

VOB Method: Satisfaction Surveys - Overview of methodology stages and steps

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Plan
1

__1.1:__ Define Scope of Study

__1.2:__ Determine Sample Size

__1.3:__ Develop Execution Plan

__1.4:__ Design Questionnaire

__1.5:__ Onboard Interviewer

__1.6:__ Conduct Pilot Test

Measure
2

__2.1:__ Implement Satisfaction Survey

__2.2:__ Conduct Quality Assurance Checks

Analyze
3

__3.1:__ Consolidate and Process Data

__3.2:__ Conduct Data Analysis and Derive Results

Report
4

Combined Beneficiary Experience report, integrating all VOB sources

Improve
5

Guidelines are set here; however, this stage is not part of Adaa's mandate

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Plan

1

1.1: Define Scope of Study

1.2: Determine Sample Size

1.3: Develop Execution Plan

1.4: Design Questionnaire

1.5: Onboard Interviewer

1.6: Conduct Pilot Test

1.1 Define Scope of Study

Step Overview	Step Outputs
The scope of the satisfaction survey including services, channels, and beneficiary segments, is defined	*Satisfaction Survey Scope*

1.2 Determine Sample Size

Step Overview	Step Outputs
Based on the scope selected and statistical standards, the sampling method is defined and sample sizes are calculated	*Survey Sample Sizes*

1.3 Develop Execution Plan

Step Overview	Step Outputs
An execution plan is developed comprising of all activities, along with their expected timeline	*Execution Plan*

1.4 Design the Questionnaire

Step Overview	Step Outputs
The questionnaire designed to ask beneficiaries about their satisfaction with the service or journey is developed	*Survey Questionnaire*

1.5 Onboard the Interviewer

Step Overview	Step Outputs
Interviewers are prepared to engage with beneficiaries with the help of briefing notes on the scenario	*Interviewer Briefing Notes*

1.6 Conduct Pilot Test

Step Overview	Step Outputs
A pilot is carried out to ensure the questions and scenarios capture the required details before the full-scale implementation	*Pilot Findings*

Step Overview Step Outputs

Plan

1

The first step involves defining the scope of the satisfaction survey exercise, which helps to more efficiently utilize resources and time, and ensures results lead to focused service improvement opportunities.

Measure | Analyze | Report | Improve

Scope
Sample Size
Execution Plan
Questionnaire
Interviewer
Pilot

Segments

What beneficiary segments within the scoped services will answer the survey?

Demographic characteristics

Segments are determined based on the demographic characteristics needed to satisfy the study objectives

Journey

What services should the survey measure?

Journey mapping

Sub-journeys and services that are part of the journey for different beneficiary segments

Share of Volume

Sub-journey has a high % of the total number of journeys "lived"

Channel

Which channels will the satisfaction survey evaluate?

Geographic Coverage

Includes services centers located in different cities under all 13 administrative regions

High-Visibility

Service center is situated in a prime location

Transactional Volume

Service center has a high % of the total volume of services

The scope should be comprehensive by default. Selection of specific channels, services and segments should be justified by a clear rationale and supported by data (i.e. high transaction volume)

VOB Method: Satisfaction Surveys - Stage 1: Plan – (1.1) Define Scope of Study

Plan

1

Journeys and sub-journeys will be mapped from a beneficiary centric perspective

Measure | Analyze | Report | Improve

- **Scope**
- Sample Size
- Execution Plan
- Questionnaire
- Interviewer
- Pilot

Touchpoint vs Journey Satisfaction

Entity 1: **Touch Point 1** – **Touch Point 2**

Entity 2: **Touch Point 3**, **Touch Point 4**

Touchpoints might be **entity-focused** not **beneficiary focused**

Satisfaction Score	**95%**	**x**	**95%**	**x**	**95%**	**= 85%**

Full journey score is not a combination of individual scores

Beneficiary-centric journey mapping benefits

Focus on beneficiary experience and understand potential discrepancies versus entity's perspective

Identify "**Moments of Truth**", by measuring varying touchpoints importance relative to beneficiaries

Capturing **in-between** touchpoints **factors** that influence overall beneficiary experience (e.g. long waiting time…etc)

Plan

1

When choosing a sampling methodology, the only determining criteria is whether there is data available on the population size of each beneficiary segment, indicating existence of sub-groups.

Illustrative Example

Decision Tree: Selecting a Sampling Method

Is data about the sub-groups (segments / channels) available?

- Yes → **Use Stratified Sampling**
- No → **Use Simple random Sampling**

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Plan

1

Once a sampling method is selected, the sample size is determined. It focuses on ensuring the sample of beneficiaries selected to be interviewed is representative of the beneficiary population being surveyed. (Statistically)

Measure
Analyze
Report
Improve

Scope
Sample Size
Execution Plan
Questionnaire
Interviewer
Pilot

The sample size follows a formula which depends on three factors:

Margin of Error

This is the estimated % error to which the satisfaction of the actual population is different to the reported one based on the sample

The required margin of error is between 5-10%

Confidence Level

This indicates the % of confidence that we have in the satisfaction score

The required confidence level is 95%

Population Size

The estimated size of the beneficiary population being assessed. A larger population size typically requires a larger sample size to achieve statistical representativeness

Depends on service

When determining the sample size for a given survey, there are two considerations:

- **Single Population Sampling**: When the population being sampled for has no other sub-groups to be reported on. This approach assumes the satisfaction score would not vary greatly within the same population group. The standard to follow in this case is a margin of error of 5% and a confidence level of 95%

For this **margin of error (5%)** and **confidence level (95%),** a **sample size of at least 384 respondents** is required

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Plan

1

Example – Measuring beneficiary satisfaction with Issuance of National ID

Measure
Analyze
Report
Improve

Scope
Sample Size
Execution Plan
Questionnaire
Interviewer
Pilot

Population Size	Sample Size
22M Beneficiaries	384 Beneficiaries

To measure the satisfaction of beneficiaries with the service of National ID Issuance, the population size is determined (around ~22M businesses). Given a margin of error of 5% and confidence level of 95%, the sample size is defined as n = 384 businesses person

- **Sub-Population Sampling***:* When the population being sampled includes sub-groups that shall be reported on, the margin of error to be applied is a maximum of 10%, and the same confidence level of 95%.

> ! The **minimum sample size** for every population sub-group is **91 respondents**, with a **margin of error of 10%** and a **confidence level of 95%**

- **Service Center Sampling:** the minimum sample size to report the results for any given service center will be 30 responses, based on the Central Limit Tier

VOB Method: Satisfaction Surveys - Stage 1: Plan – (1.2) Determine Sample Size

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Plan

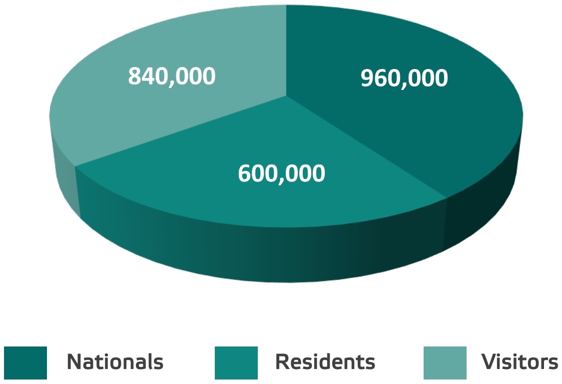
1

Example – Measuring Beneficiary Satisfaction with the Hajj Journey

Measure
Analyze
Report
Improve

Scope
Sample Size
Execution Plan
Questionnaire
Interviewer
Pilot

Population Split by Segment



When trying to evaluate the satisfaction of beneficiaries conducting Hajj, beneficiaries having conducted Hajj in the last year are collated into a list. It includes 2.4 Million beneficiaries and are segmented by Nationals (40%), Residents (25%) and Visitors (35%), each Male and Female.

*To satisfy the conditions of a 10% margin of error and a 95% confidence level for every segment and gender, each sub-sample must include at least 91 respondents, which would amount to a total sample size of 577 respondents (91 sample size * 6 sub-groups).*

VOB Method: Satisfaction Surveys - Stage 1: Plan – (1.3) Develop Execution Plan

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Plan
1

This step focuses on developing an execution plan for the satisfaction survey. The execution plan details the activities that will be carried out under *Plan, Measure*, *Analyze* and *Report* steps. Factors which will influence the effort and timeline required for each step have been defined below:

Measure
Analyze
Report
Improve

Scope
Sample Size
Execution Plan
Questionnaire
Interviewer
Pilot

Execution Plan Development

Stage	List Activities for each Stage	Factors Influencing Timeline	Expected Duration
Plan	- Design a survey administration plan (including interview times, location)	• Selecting and onboarding interviewers • Conducting pilot for surveys	2 – 4 weeks
Measure	- Implement survey activities (including interviewer deployment) - Conduct quality assurance checks	• Type of surveys used (e.g. interviewer-led, self-administered) • Sample size and geographical coverage	6 - 10 weeks *(depends on the number of surveys)*
Analyze	- Consolidate and process data - Conduct data analysis and derive results	• Size of study data • Levels and types of analysis (quantitative or qualitative or both	1-3 weeks *(depends on the volume of data from surveys)*
Report	- Develop Beneficiary Experience Report - Publish reports to targeted audience	• Size of study data • Number of reports	1-3 weeks *(depends on the number of reports generated)*

Below are some guidelines to follow when planning activities under the execution plan:

1. *Realistic*: The timelines defined must be realistic and achievable given the underlying activities
2. *Comprehensive*: All activities under the *Plan, Measure, Analyze and Report* stages are included in the plan
3. *Accountability*: Ownership of every activity and relevant KPIs in the execution plan are clearly defined

VOB Method: Satisfaction Surveys - Stage 1: Plan – (1.3) Develop Execution Plan

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Plan

1

Measure
Analyze
Report
Improve

- Scope
- Sample Size
- **Execution Plan**
- Questionnaire
- Interviewer
- Pilot

Before developing the execution plan, the survey administration method is defined. Three approaches exist:

Surveying Methods

In-Person Interview

Beneficiaries are surveyed in a face to face setting by an interviewer leading the conversation

Phone Interview

Beneficiaries are surveyed over the phone, led by an interviewer leading the conversation

Self-administered Survey

Beneficiaries are surveyed through SMS or over a mobile application, social media platform, or email

As such, two main decision points help define what survey methodology to choose :

Can the survey be conducted physically

- **Yes** → Interviewer Led In-Person interviews
- **No** → Can the survey be conducted online based on available contact information, and takes less than 15 min to complete?
  - Yes → Self-Administered online Surveys
  - No → Interviewer Led Phone Interviews

To enhance cost effectiveness, priority should be given to online surveys, followed by phone and in-person surveys.

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Plan

1

Measure
Analyze
Report
Improve

Scope
Sample Size
Execution Plan
Questionnaire
Interviewer
Pilot

Typical Execution Plan for a Surveying Exercise

	Week														
Activity	01	02	03	04	05	06	07	08	09	10	11	12	13	14	Owner
Plan															
Define Scope															
Design Questionnaire															
Determine Sample Size															
....															
Measure															
Execute Fieldwork															
Conduct Quality Assurance Checks															
Analyze															
Consolidate and Process Data															
Conduct Data Analysis and Derive Results															
Report															
Develop Beneficiary Experience Reports															
Verify Developed Report															
....															
Improve															
Synthesize Findings and Prioritize Actions															
....															

Plan

1

The next step is related to developing the questionnaire that will be used to measure customer satisfaction. It includes close-ended multiple choice questions.

Measure
Analyze
Report
Improve

Scope
Sample Size
Execution Plan
Questionnaire
Interviewer
Pilot

The questionnaire consists of three main sections including:

1. Introduction (objectives, survey duration, qualification questions…)
2. Beneficiary Demographic Data (name, contact details, age, nationality, gender, region…)
3. Survey Questions (closed questions on a scale of (1-5), clearly written, unbiased, specify a service satisfaction driver; in addition to additional comments for the participant to describe strength points and improvement opportunities)

Section 1: Questionnaire Introduction

The survey introduction make the purpose, duration and other key components of the questionnaire clear to the respondent:

Survey Introduction Components

Objectives
Describes the survey objectives and what does it aim to achieve

Duration
Defines the time required to answer the survey

Confidentiality
Provides assurance about how will the data collected be used

Qualification Questions
Determines applicability of the beneficiary to participate in the survey

Respondent Qualification Criteria

The questionnaire is applicable only to those individuals who meet qualification requirements. They are derived from the research objectives and scope, and filter out beneficiaries who are not in scope. Respondent qualification questions cover the criteria below:

1. **Questionnaire participation willingness**: Confirms the respondent's willingness to take part in the survey
2. **Utilization of service in scope:** Verifies whether the respondent consumed the service through the defined channel in scope
3. **Recent service utilization:** Ensures whether respondents consumed the service within the time frame specified

Example – Qualification checks

Example 1: Are you willing to participate in this questionnaire? If yes, continue; if no, end questionnaire

Example 2: Did you apply for national ID issuance through online portal? If yes, continue; if no, end questionnaire

Example 3: Did you apply for national ID issuance in the past 6 months? If yes, continue; if no, end questionnaire

Beneficiary contact data (e.g. respondent name, address, identification number, phone number, mailing address) and demographical data (e.g. age, sex, income level, race, employment, location) are important in two respects: Accessibility to respondents (they can be contacted again) and data analysis when trying to understand if certain beneficiary segments have different satisfaction scores.

Plan
1

Measure
Analyze
Report
Improve

Scope
Sample Size
Execution Plan
Questionnaire
Interviewer
Pilot

Generic Beneficiary Questions

Classification	*Question*	*Answer*
Name	*Respondent name (First and family name)*	
Phone Number	*Respondent phone number*	
Age	*Respondent age*	<1> From 18 to 29 years old <2> From 30 to 39 years old <3> From 40 to 55 years old <4> From 56 to 60 years old <5> 60 years old and above
Nationality	*Respondent nationality*	<1> Saudi <2> Non Saudi
Gender	*Respondent gender*	<1> Male <2> Female
Region	*Respondent region (should include all 13 administrative regions)*	<1> Riyadh <2> Makkah <3> …

Note: other classification questions could be selected based on the questionnaire scope and objectives.

Section 3: Survey Questions

When drafting the questions that will form part of the questionnaire there are several factors to take into consideration:

Data Collection Method

The length of questionnaire and the wording of a question is often different based on the data collection method (face-to-face, telephonic and online self administered interviews)

Respondent Characteristics

The characteristics of respondents should be considered when drafting the questions (e.g. questions intended for the public should be written in plain and understandable language)

Data Complexity

When collecting complex data it's necessary to word the questions carefully and include instructions whenever necessary.

Translation

It's important to consider translating the questionnaire into several languages (whenever applicable) to ensure full comprehension of questions by the respondent.

Consistency

The meaning of the questions must be the same for all respondents, therefore, it's important to ensure clear and unambiguous wording for all questions.

VOB Method: Satisfaction Surveys - Stage 1: Plan – (1.4) Design Questionnaire

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Plan

1

Measure
Analyze
Report
Improve

Scope
Sample Size
Execution Plan
Questionnaire
Interviewer
Pilot

There are two types of questionnaires, Macro-Journey-level and Service-level questionnaires.

- The **macro-journey level questionnaire** captures the satisfaction of beneficiaries with the macro-journeys, which can be comprised of multiple government entities and services covering a selected key life event of the beneficiary
- The **government entity level questionnaire** captures the satisfaction of beneficiaries with the specified services provided by the related government entity

Both surveys will be structured in 3 levels: Overall satisfaction (with the journey or service), driver satisfaction and sub-driver satisfaction (when driver satisfaction is scored at 3 or below)

Beneficiary Satisfaction Questionnaire

Section 3: Questions

L1	Overall Service Satisfaction	
L2-1	Procedures	*Iterate 1 to cover all services within the Macro-journey*
L2-2	Channel	
L3-2.1	Cleanliness	*Open level 3 sub-driver questions if driver satisfaction is scored at 3 or below*
L3-2.2	Ease of access	
L2-3	Staff	
L2-4	Timeliness	
L2-5	Service Outcome	

1. Drivers and Sub-Drivers of Satisfaction:

Drivers and sub-drivers are the areas that determine the satisfaction of beneficiaries with a government service. Based on the drivers used by global benchmarks, 5 standard drivers have been selected.

Depending on whether the beneficiary can avail the service in the digital or physical channel, some drivers will focus on different aspects.

Drivers		Description
Procedures		Assesses the availability of information about the service and the ease to consume the service
Timeliness		Evaluates the total time it took, as well as the time spent waiting in queues or on call by beneficiaries when consuming the service
Service Outcome		Assesses whether the service was consistently delivered in line with the service's promise, and if the end-product satisfies the needs of beneficiaries
Channel	Physical	Evaluates the effort made by beneficiaries to access the physical facilities, its cleanliness, appearance and appeal.
	Digital	Evaluates the quality, appearance and ease of use and access.
Staff	Physical	Evaluates the beneficiary's view of the staff's know-how as well as whether staff dealt with the beneficiary in a polite and respectful manner
	Digital	Evaluates the beneficiary's view of the chat agents/bot's know-how as well as whether agent/bot dealt with the beneficiary in a polite and respectful manner

Plan

1

Measure
Analyze
Report
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Pilot

1. Drivers and Sub-Drivers of Satisfaction:

Each of the drivers of satisfaction correspond to sub-drivers. Below are examples of sub-driver questions for each of the key drivers of satisfaction.

#	Drivers	Sample Sub-Driver Questions
1-1	*Procedures*	• How satisfied are you with the availability of information about the service? • How would you rate the ease of consuming the service?
1-2	*Physical Location*	• How would you rate the overall quality of the service center/website? • How satisfied are you with the cleanliness of the service center?/How satisfied are you with the ease of navigation of the entity's website?
1-3	*Staff*	• How would you rate the friendliness of the employees at the service center? • How satisfied are you with the knowledge of the staff?
1-4	*Timeliness*	• How satisfied are you with the time you had to wait for a customer service agent to attend to you? • How satisfied are you with the service processing time?
1-5	*Service Outcome*	• How satisfied are you with the outcome of the service?

Plan

1

Measure: Scope, Sample Size
Analyze: Execution Plan
Report: **Questionnaire**
Improve: Interviewer, Pilot

The applicability of each sub-driver is validated against the service being measured. The below decision tree provides a guide to select sub-drivers of satisfaction to be used in the survey:

Decision Tree: Selecting Sub-Drivers

Driver selection → Do the standard drivers and sub-drivers apply to the service?

- **Yes** → *Apply recommended satisfaction sub-drivers*
- **No** → *Determine sector-specific drivers either by conducting beneficiary **focus groups** <u>or</u> by leveraging team know-how* → *Apply recommended satisfaction sub-drivers*

Examples

Apply recommended satisfaction sub-drivers	Use the standard driver of **Timeliness** and sub-driver of **Service processing time**
Apply recommended satisfaction sub-drivers	Based on an informed decision, refine the sub-driver from **quality of the service center** to **quality of the school premises**
Apply recommended satisfaction sub-drivers	Based on an informed decision, add a new sub-driver under the driver of **Physical Channel** such as **quality of the airline seat, or quality of food provided on board the airline**
Apply recommended satisfaction sub-drivers	Based on an informed decision, add a new driver and sub-driver to assess Educational curriculum; Driver: **Curriculum**, Sub-driver: **Clarity of curriculum**

Driver selection will be tested and refined through driver importance assessment for future surveys (detailed in the analysis methodology)

Plan

1

Measure
Analyze
Report
Improve

Scope
Sample Size
Execution Plan
Questionnaire
Interviewer
Pilot

If surveys are conducted in-person or by phone, an interviewer workforce would be identified and then recruited. When interviewing and selecting interviewers for the exercise, considerations, in addition to time and cost involved, include:

Industry Knowledge

The interviewer has experience working with government entities as well as sector-specific knowledge required

Geographical Coverage

The interviewer is able to provide coverage to relevant geographical areas of focus for the exercise

Longstanding Experience

Each type of interview, questionnaire or beneficiary segment might require a different skillset; hence, it is important to ensure that the interviewer fulfills any specialized requirements

Interviewers must be **experienced in conducting surveys in-person or over the phone**, as well as have **relevant experience conducting surveys for government services** – Interviewer Experience is a critical factor to ensure respondent engagement

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Plan

1

Measure
Analyze
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Improve

Scope
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Pilot

To ensure interviewers are equipped with the adequate skillset, interviews are conducted over the phone or in an office during which, candidate interviewers are evaluated against a set of three criteria aimed at assessing their skills and personality.

Example: Interviewer Qualification Criteria

Interviewer Attributes

Surveying Experience

The interviewer has solid past experience conducting in-person surveys

Communication Skills

Interviewers have the required verbal communication skills

Longstanding Experience

Interviewers engage with respondents in a sociable and friendly manner

Conduct a **screening of potential interviewers** by probing them about their **experience implementing surveys** and gauge their **communication skills and personality**, as well as by conducting a **mock interview, providing them with a survey questionnaire** and have them simulate an actual interview with a beneficiary

Plan

1

Measure
Analyze
Report
Improve

Scope
Sample Size
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Interviewer
Pilot

To have clear alignment on the end goal of the exercise with the interviewer workforce, workshop sessions are conducted to train interviewers on the defined scope and questionnaire. Training helps interviewers properly probe beneficiaries with a deeper understanding of the service, in a courteous and professional manner, tailored to targeted beneficiary segments

Interviewer Training Material

Training Guidelines

Who are the beneficiaries being surveyed?	How to explain the objectives of the survey?
What sector-specific areas need to be assessed?	How to explain questions to beneficiaries?
How to engage beneficiaries at service centers?	How to write comments?
What and how to ask?	How to probe for service improvement suggestions?
How and what to observe and pay attention to?	How to present oneself to beneficiaries?
	How to talk over the phone?

Test a **randomly selected batch of interviewers** by **probing them with questions regarding the briefing notes and guidelines** (i.e. location, schedules, service outcome, attitude, behaviors), and gauge if the briefing has fulfilled its objective

Plan

1

Measure

Analyze

Report

Improve

Scope

Sample Size

Execution Plan

Questionnaire

Interviewer

Pilot

Before conducting the survey, it is important to carry out a brief pilot. Results of the pilot exercise will give an indication of whether the questions have been designed appropriately to capture relevant information and the expected outcome is being derived without an issue.

To do so, a pilot shall look to answer the following questions:

1. Is the questionnaire easy to follow?
2. Are the briefing notes clear enough to enable interviewers to conduct the interview?
3. Is the estimated time to answer this survey suitable based on the response of the beneficiaries?

If one or more answers to the above is negative, the relevant aspect of the questionnaire or the survey administration plan would be revisited and refined accordingly.

Number of pilots

Depending on the scope of the exercise, a pilot survey on five beneficiaries is recommended.

A pilot survey with at least five beneficiaries should be conducted

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Measure

2

2.1: Implement Satisfaction Survey

2.2: Conduct Quality Assurance Checks

2.1 Implement Satisfaction Survey

A fieldwork plan is developed, after which Interviewers conduct visits accordingly and the survey is disseminated	*Fieldwork Planning and Implementation*

2.2 Conduct Quality Assurance Checks

Sample QA checks are conducted during the interview fieldwork to ensure the fieldwork plan is conducted as required	*Quality Control Implementation*

Step Overview   Step Outputs

Measure

2

PLAN | MEASURE | ANALYZE | REPORT | IMPROVE

Implement

QA Checks

Deploy Surveys / Interviewers and Monitor Plan

The survey / interviewers are then deployed according to the fieldwork plan, on the specified dates, locations, and timings, measuring the related services and entities. Periodic status updates are conducted to monitor the plan, which is inclusive of:

- Completion rate and progress (e.g. comparing surveys samples to target sample size)
- Anticipated risks and challenges
- Execution plan for pending activities

While monitoring interviews on a daily basis, **checks must be conducted to ensure interviewers** are on-track to **complete their quota of surveys on time.** A status update report is developed to follow-up on progress.

Before the end of the exercise, it is ensured that the guidelines set in the plan are achieved. In case of any selection bias or sampling error, additional surveying will be conducted

Satisfaction Surveys Fieldwork

Interviewer-led		Self-Administered
Deploy interviewer workforce and monitor daily progress	Survey Deployment	Deploy survey to beneficiaries and monitor daily progress
Review of plan and completed surveys is conducted	Closure	Review all responses from beneficiaries ensuring they align to the plan

Measure

2

PLAN

MEASURE

ANALYZE

REPORT

IMPROVE

Implement

QA Checks

Lastly, quality assurance is carried out to ensure that the satisfaction surveys were conducted properly and the risk of data falsification is minimized. A strong governance and oversight is required.

Quality Assurance Checks

There are a number of ways to conduct quality assurance analysis, a few of which are listed below:

Location

Validate the location and address of the interview using GPS technology in the case of physical channels

Media

Obtain photographs, videos (whenever applicable) or audio recordings collected by interviewers as proof of their interview

Call-back

Contact 10% of the total participants after the interviews to verify their participation and completion of the interview

Joint Visits

Participate in fieldwork activities on 10% of the total surveys or visits to perform quality assurance checks

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Analyze

3

3.1 Consolidate and Process Data

Step Overview	Step Outputs
Survey data is consolidated into a dataset and errors, missing data and outliers are identified and processed accordingly	*Cleaned Survey Dataset*

3.2 Conduct Analysis & Derive Results

Step Overview	Step Outputs
Beneficiary satisfaction scores are computed, relationships between attributes are explored, drivers of satisfaction are analyzed and open ended questions are assessed	*Analysis and findings*

Step Overview   Step Outputs

Analyze

3

Process Data

Drive Results

After the satisfaction surveys are completed, the questionnaires used to capture beneficiaries feedback are consolidated by the different attributes used in the survey such as services, segments, and channels.

Example – Consolidation of Satisfaction Survey Data

Beneficiary 1	Beneficiary 2	Beneficiary 3	Beneficiary n
Completed questionnaire with feedback across service related drivers	Completed questionnaire with feedback across service related drivers	Completed questionnaire with feedback across service related drivers	Completed questionnaire with feedback across service related drivers

Consolidate findings on **overall** beneficiary **satisfaction scores**

Consolidate all Satisfaction Surveys Visits

Consolidate scores **findings for each service**

Consolidate Survey Raw Data for Service 1	Consolidate Survey Raw Data for Service 2	Consolidate Survey Raw Data for Service n

Consolidate score **findings for each driver**

Consolidate Survey Raw Data for Drivers	Consolidate Survey Raw Data for Drivers	Consolidate Survey Raw Data for Drivers

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Analyze

3

Process Data

Drive Results

Data Submission

Surveys are submitted digitally and data is consolidated instantly. Once the dataset has been consolidated, it is reviewed for data quality. This step focuses on identifying and correcting erroneous and missing values inside the dataset's closed-ended questions. Typical data integrity errors are:

- **Value and Format Errors:** The actual value does not correspond to the values or format defined in the questionnaire (e.g. Time of visit of the service center is "27 PM", Text instead of numerical values)
- **Missing Values**: Corresponds to questions or fields unanswered, or the results of an error when the data was consolidated.

If the data includes any of the above, then three measures are considered:

Data Integrity Measures

Call Back
Call back the interviewer or beneficiary to revise what value was originally noted

Remove and Replace Data
Identify errors in dataset and correct errors or replace data

Defining Outliers
Identify and delete extreme values in data (up to 10% of either positive or negative values)

After cleansing the dataset from errors and missing data, the next step is to identify and remove outliers from the dataset. An outlier is an observation that greatly differs from other values in a dataset.

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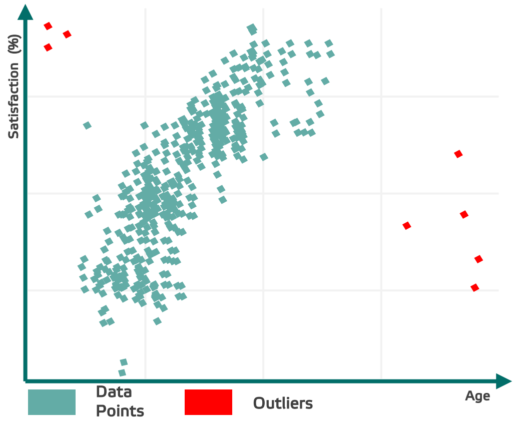
Analyze

3

Process Data

Drive Results

Example – Defining an Outlier



Outliers are typically extreme values found in a dataset; the following data clearly shows that the 5 outlier beneficiaries represent a group that is substantially different from the rest

When outliers are identified, they usually reflect any of the below:

- **Errors in Data**: Certain outliers with extreme values might reflect an error made during data entry
- **Biased Outcome**: The outlier might belong to a beneficiaries who were biased and decide to score all the answers either at the lowest of 1, or the highest of 5.

If outliers are found to represent less than 10% of the total points, they are considered for removal

This step is critical to the satisfaction survey, since it ensures the data points are similar enough to allow for patterns and relationships to be identified during the analysis phase

Analyze

3

Process Data

Drive Results

Consolidation of data from different channels

At a national level, Adaa will test the adjustments needed to consolidate satisfaction data collected through different channels (in person, phone and web-based)

Data collection

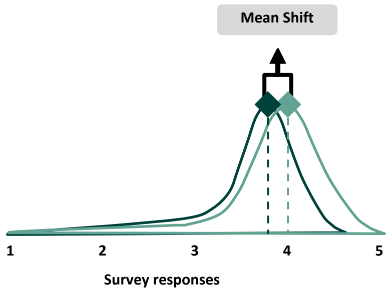
Collect data for the same survey through two different channels

1. **Primary (Phone/Watani)**: base of responses unbiased by channel

2. **Tested (in person):** collection of responses potentially biased by the channel

F-testing & T-testing

Conduct statistical analysis to asses potential bias, based on F-testing and t-testing for T<5%



Data adjustment (if required)

If the T-test for the mean shift results in a p-value lower than 5%, this would indicate a statistical significance is found between results acquired between the primary channel (Watani/phone surveys) and the tested new channel (in person).

The in person results will be corrected by a Channel Adjustment Factor

CAF=Mean A/Mean B

Analyze

3

Process Data

Drive Results

Once the dataset is processed, it is ready for analysis. This step consists of conducting standard analysis on respondents' feedback, to calculate the beneficiary satisfaction score over a single dimension (*Level 1*), identify the hotspots and root cause for satisfaction across multiple dimensions *(Level 2),* and finally analyze open ended questions *(Level 3).*

Analysis of Open-Ended Qualitative Feedback

Conduct an analysis of open-ended questions feedback using analysis techniques such as sentiment analysis and *Word cloud* visualizations

Hotspot and root cause analysis

Calculate and interpret the satisfaction against individual dimensions (i.e. Drivers of satisfaction, channels, beneficiary segments)

One-Dimensional Satisfaction Scores

Calculate and interpret the satisfaction against individual dimensions (i.e. Drivers of satisfaction, channels, beneficiary segments)

Analyze

3

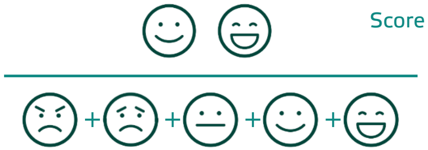
Process Data

Drive Results

Level 1: One-Dimensional Beneficiary Satisfaction Scores

The first analysis requires calculating the CSAT or Customer Satisfaction Score over the high level dimensions such as service, channel, driver, or demography.

CSAT =



Score of 4 or 5

Overall

The CSAT score is calculated as the number of satisfied respondents who scored 4 or 5, over the total number of respondents

The CSAT is generally calculated for the following:

Satisfaction Scores against individual dimensions

Overall Satisfaction

What is the overall beneficiary satisfaction score with the services or the journey?

Drivers

What is the beneficiary satisfaction with the drivers?
(Procedures, Staff, Physical Location, Digital Channel, Timeliness, Service Outcome).

Channels

What is the overall satisfaction of beneficiaries who consumed the service using a given channel?
(Physical Location, Website, Mobile Application)

Beneficiary Segments

What is the satisfaction scores with a service or journey, of a given beneficiary segment?
(i.e. Citizens, Residents)

Analyze

3

Process Data

Drive Results

Example – Calculating the Beneficiary Satisfaction Score (CSAT)

- **Beneficiary Satisfaction Score =** # of Satisfied (scored 4 and 5) Beneficiaries / Total # of Responses
- 3 / 9 = **33%**

Individual Beneficiary Satisfaction Score	Score
1	
2	
1	
5	
1	
4	
1	
5	
3	

Overall Beneficiary Satisfaction Score

33%

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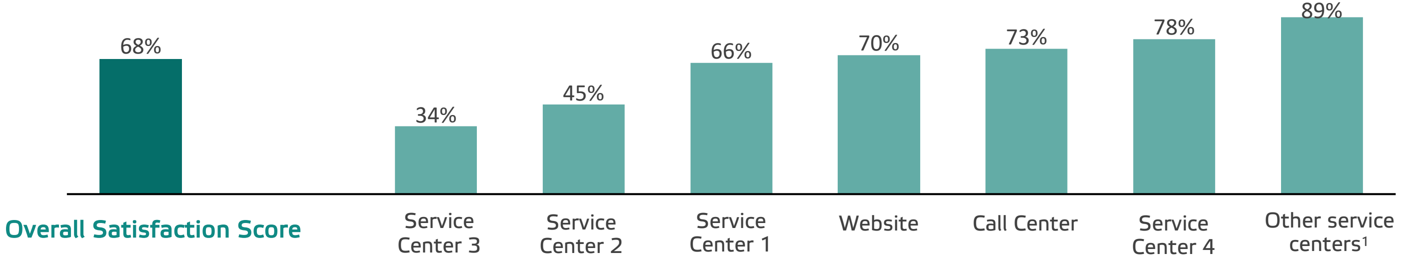
Analyze

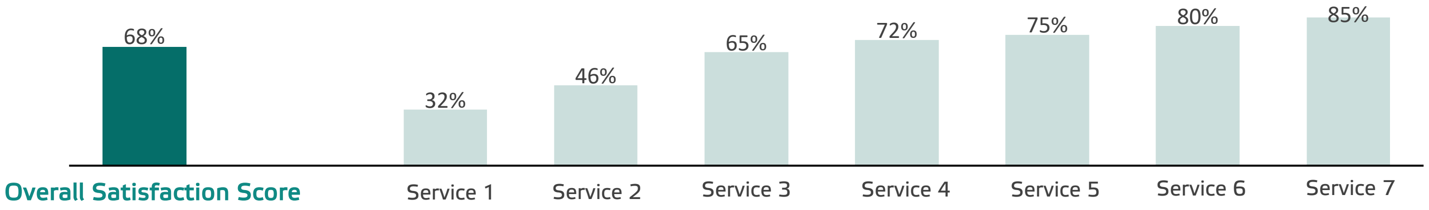
3

Process Data

Drive Results

Example – Satisfaction Score by Channels and Services





A trend analysis of the satisfaction score should be conducted to evaluate changes in satisfaction score over a period of time.

1. 1. Service centers with less than 30 responses will not be reported individually

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Analyze

3

Process Data

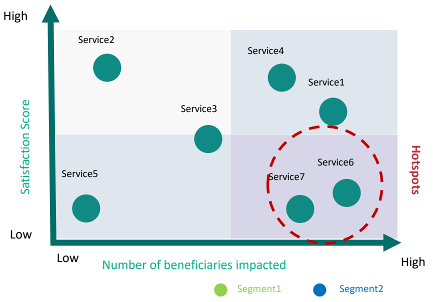
Drive Results

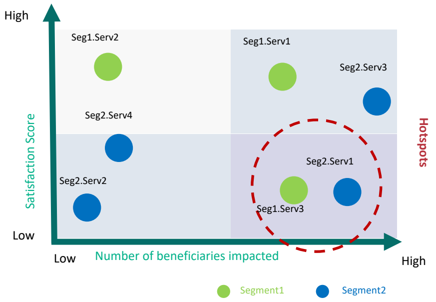
Level 2: Hotspot and root cause analysis

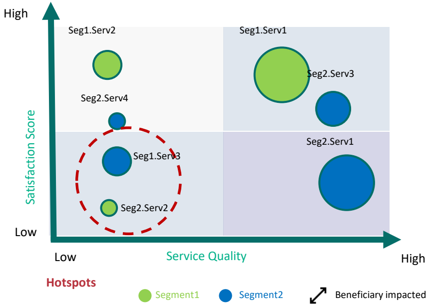
Hotspot analysis

It's a structured analytical framework that can be applied on different journey phases through a multidimensional analysis to address pain points from different angels providing a overview insight to identify key improvement areas.

Example: Hotspot analysis dashboard







Definition

Data Sources

2
Dimensional analysis to identify services with **highest beneficiary penetration** and **lowest satisfaction**

- Satisfaction score per service
- Number of beneficiary impacted

3
Dimensional analysis to identify hotspots for different **beneficiary segments** involved in same journey

- Satisfaction score per service
- Number of beneficiary impacted
- Beneficiary segments

4
Dimensional analysis that integrates **service quality** to **satisfaction** to capture full **service experience**

- Satisfaction score per service
- Number of beneficiary impacted
- Beneficiary segments
- Service quality (e.g. Op. KPIs)

Analyze

3

Process Data

Drive Results

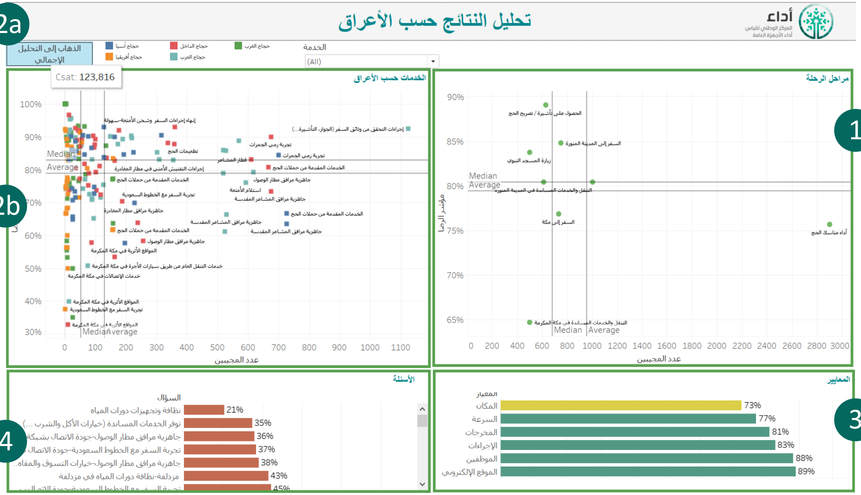
Level 2: Hotspot and root cause analysis

Example: Hotspot analysis dashboard

2a **Toggle** between **segmented/non-segmented** service analysis

2b Hotspot analysis applied on **services** within selected journey phase to identify **detailed improvement areas**

4 **Sub-driver analysis** to reveal actual **root cause** behind low satisfaction levels



1 Hotspot analysis applied on **journey phases** level to identify **high-level improvement areas**

3 **High-level satisfaction driver** analysis to identify dissatisfaction factors[1]

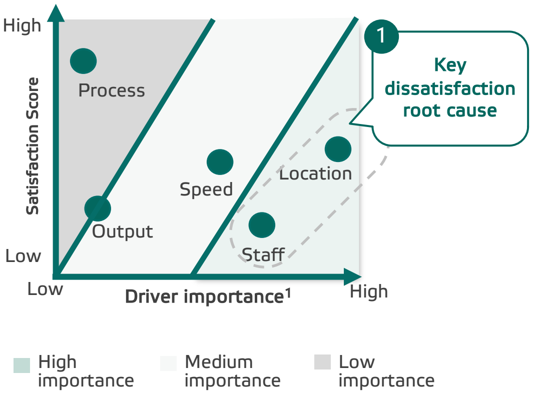
Level 2: Hotspot and root cause analysis

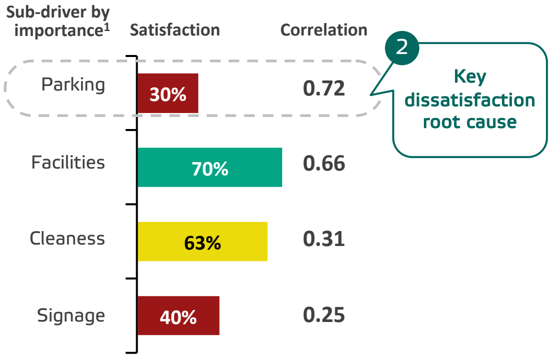
Level 2: Hotspot and root cause analysis

Driver importance

Pearson's correlation coefficients are used to test statistics that measures the statistical relationship, or association, between the satisfaction drivers and the overall satisfaction. It gives information about the magnitude of the association, as well as the direction of the relationship.

Example – Driver importance example





[1]Importance is calculated using Pearson correlation

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Analyze

3

Process Data

Drive Results

Level 3: Analysis of Open-Ended Qualitative Feedback

Moreover, responses to open-ended questions are also studied to identify areas of strengths and weaknesses from the point of view of the respondents

Two approaches are defined to extract findings from responses to open ended questions:

Manual Review: Review manually beneficiary responses, especially for surveys with low satisfaction score, to better understand the beneficiary's experience and the attitudes of beneficiaries after consuming the service.

Example – Manual Assessment of Textual Feedback

In this form of analysis, beneficiary feedback is evaluated by looking at positive and negative sentiment differently.
In this case the focus is on Staff performance, and the open-ended question asked is "*Please comment further on any questions or issues covering staff performance".*

#	Staff Score	Feedback
1	25%	"…The staff seemed **inconvenienced** by my requests…"
2	75%	"…employees acted **efficiently**…"
3	25%	"…staff did **not seem professional**…"
4	50%	"…employees were **impolite and unprofessional** …"
5	75%	"…staff sounded **knowledgeable…**"

Findings

Positive Feedback	Negative Feedback
The positive feedback received focuses on the **staff's know-how** and ability to support beneficiaries. ("efficiently", "knowledgeable")	The negative feedback on the other hand stemmed from an **attitude or professionalism problem** ("inconvenienced, "not seem professional", "impolite")

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Analyze

3

Process Data

Drive Results

Natural Language Analysis:

Leverage natural language processing (NLP) techniques to identify common key words, evaluate sentiment and gauge the emotions of the beneficiary

Example – Sentiment Analysis and Word Cloud Visualization

In this form of analysis, beneficiary feedback is evaluated by looking at positive and negative sentiment differently. In this case the focus is on Staff performance, and the open-ended question asked is "*Please comment further on any questions or issues covering staff performance".*

#	Feedback
1	"…The staff seemed **inconvenienced** by my requests…"
2	"…employees acted **efficiently**…"
3	"…staff did **not seem professional**…"
4	"…employees were **impolite and unprofessional** …"
5	"…staff sounded **knowledgeable…**"

Analysis & Visualization

Specialized software will quantify sentiment, and generate word cloud visualizations

Word Clouds

Negative Sentiment/Weaknesses

"bad service" "impolite" "bad service" "Unprofessional" "Inconvenienced" "impolite" "Loud" "confused"

Most negative sentiment is focused on Staff attitude, behavior and professionalism

Positive Sentiment/Strengths

"Effective" "Supportive" "Knowledgeable" "Efficient" "Effective" "Amiable" "Friendly"

Positive sentiment focuses on the employees' know-how and ability in servicing beneficiaries

This analysis of open-ended responses is typically carried out to complement and validate the findings from the quantitative analysis.

Satisfaction Surveys

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Satisfaction Surveys

Measures the self-satisfaction of the beneficiary from the experience provided by the device from a quantitative perspective

Mystery Shopping

Assess the compliance of entity with service standards and verify the gaps in the service delivery procedures of the beneficiary

Can be substituted by collection of operational indicators

Focus Groups

Assess key service challenges and identify opportunities for service improvements from a qualitative perspective

Beneficiary Experience Reports

Implementation Guidelines

VOB Method: Satisfaction Surveys

1 Satisfaction Surveys

2 **Mystery Shopping**

3 Focus Group

Beneficiary Experience Reports

Mystery Shopping: A voice of beneficiary method that evaluates compliance of the service with set quality standards. It involves engaging with trained evaluators that observe key aspects of a service and factually report on every aspect of their experience

Who can do the research?

Conducted by independent Mystery Shopping who aren't related to the services being assessed

Why is it used?

Used to gauge compliance of services to set standards and identify service pain points

How often is it implemented?

Implemented in a periodic and systematic manner

Compliance Drivers

- Service Outcome*
- Timeliness*
- Physical/ Digital Channel
- Staff
- Procedures

*where applicable

Key Steps

1. **PLAN**: Define the scope and approach, as well as, hire and onboard Mystery Shopping, and conduct a pilot
2. **MEASURE:** Implement mystery shopping visits and conduct quality assurance checks
3. **ANALYZE:** Consolidate and process the data and conduct analysis to derive insights

Measurement Objectives

- Deep-dive into areas, which are not compliant with service standards
- Measure the compliance score of services

VOB Method: Mystery Shopping | Overview of Methodology Stages and Steps

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Plan
1

1.1: Define Scope of Study
1.2: Draft Scenarios
1.3: Develop Execution Plan
1.4: Design Questionnaires
1.5: Onboard Mystery Shopping
1.6: Conduct Pilot Test

Measure
2

2.1: Execute Mystery shopping Visits
2.2: Conduct Quality Assurance Checks

Analyze
3

3.1: Consolidate and Process Data
3.2: Conduct Data Analysis and Derive Results

Report
4

Combined Beneficiary Experience report, integrating all VOB sources

Improve
5

Guidelines are set here; however, this stage is not part of Adaa’s mandate

Plan

1

1.1: Define Scope of Study

1.2: Draft Scenarios

1.3: Develop Execution Plan

1.4: Design Questionnaires

1.5: Onboard Mystery Shoppers

1.6: Conduct Pilot Test

Define Scope of Study 1.1

Mystery Shopping Scope	The scope of the mystery shopping exercise in terms of channels, beneficiary segments and services, is defined

Scenarios 1.2

Mystery Shopping Scenarios	Scenarios are identified, which will be enacted by the mystery shoppers for channels, services and segments, which are in-scope

Develop Execution Plan 1.3

Mystery Shoppers Execution Plan	An execution plan is developed comprising of all mystery shopper activities and their timelines

Design Questionnaires 1.4

Mystery Shopper Questionnaires	A questionnaire is designed based on the drivers of service quality that need to be tested

Onboard Mystery Shoppers 1.5

Mystery Shopper Briefing Notes	Mystery shoppers are selected and prepared to act their assigned scenarios with the help of briefing notes

Conduct Pilot Test 1.6

Pilot Findings	A pilot is carried out to ensure the questions and scenarios capture the required details before the full-scale implementation

Step Outputs

Step Overview

The first step involves defining the scope of the Mystery Shopping exercise, which helps to more efficiently utilize resources and time and ensures results lead to focused service improvement opportunities.

Plan

1

Measure
Analyze
Report
Improve

Scope
Sample Size
Execution Plan
Questionnaire
Shopper briefing
Pilot

Selection Criteria

Services

What services should be of focus for the mystery shopping?

Key Journey
Service is an essential part of the defined scope of macro-journeys

Limited operating data
There is no operating data collected to measure compliance

Low Satisfaction
The service has a low satisfaction score

Segments

What beneficiary segments would be included in the mystery shopping exercise?

Demographic characteristics
Segments are determined based on the demographic characteristics needed to satisfy the study objectives

Low Satisfaction
The beneficiary segment has reported a low satisfaction score

Channels

Which channels should be covered in mystery shopping?

Geographic Coverage
Includes services centers located in different cities under all 13 administrative regions

High-Visibility
Service center is situated in a prime location

Transactional Volume
Service centers have a high % of the total volume of services

! When selecting the service centers for mystery shopping, **ensure various geographical locations are covered and those with highest traffic of beneficiaries are chosen**

The scope should be comprehensive by default. Selection of specific channels, services and segments should be justified by a clear rationale and supported by data (i.e. low compliance score)

The next step is to determine the number of visits and/or calls that would be conducted by the mystery shoppers. The total number of visits is dependent on the channels to be covered by mystery shopping.

Plan

1

- Measure
- Analyze
- Report
- Improve

- Scope 1-1
- Sample Size 2-1
- Execution Plan 3-1
- Questionnaire 4-1
- Shopper briefing 5-1
- Pilot 6-1

Channels

Dimension	Description
Physical Channels	Each **selected physical channel** is recommended to be **visited at least seven times**, with **four** of these visits conducted **during peak days and hours**, and the **other three** during **off peak days and hours** to assess experiences with different levels of traffic
Online Channels and Call Centers	**Non-physical channels** including mobile application, website, and call-center are recommended to be **visited at least twice for each service** to minimize the risk of one-off experience on the assessment
Beneficiary Segments Represented	**Visits to the same channel are conducted by different beneficiary profiles** (e.g., male, female, age groups). Moreover, no channel is **visited by two different shoppers at the same time** to reduce impact of one-off situations

Given that statistically, the sample size for mystery shopping is small, for large-sized government entities, it is recommended that a significant number of visits for each channel is considered so that feedback is representative of a large and varied beneficiary base.

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Example – Determining Mystery Shopping Visit Time for a Service Center

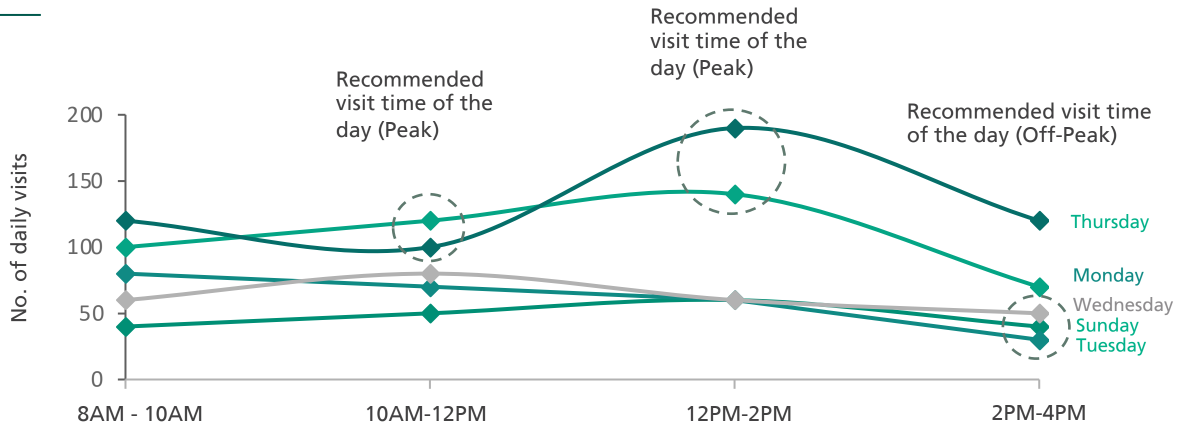
The below graph presents a hypothetical case example indicating number of visits during a typical week at a service center and recommended visits during peak and non-peak days and hours:

Plan

1

Measure
Analyze
Report
Improve

Scope
Sample Size
Execution Plan
Questionnaire
Shopper briefing
Pilot



Based on the above graph, the visits to the service center are recommended to be carried out at:

1. 4 visits during Peak days and hours of Thursday and Monday (10AM – 2PM)
2. 3 Off-peak days and hours – Sunday, Tuesday and Wednesday (2PM – 4PM)

!

Identify the peak and off-peak days and time during the week for each physical channel and ensure that **the visits at physical channels are spread across peak and off peak timings**

Illustrative Example

The second step involves defining the Mystery Shopper scenarios. Scenarios describe the journey of mystery shoppers when testing a service, what service channels will shoppers interact with, as well as, which segment of beneficiary will be represented.

Plan Example – Drafting Mystery Shopping Scenarios

1

- Measure
  - Scope
  - Sample Size
- Analyze
  - Execution Plan
- Report
  - Questionnaire
  - Shopper briefing
- Improve
  - Pilot

Combine beneficiary segments, services and channels to define scenarios to be tested

Beneficiary Segments	Channels	Services
Young Saudi Student	Riyadh Branch	Request for a new identity card
Self-Employed Elderly Saudi Male	Jeddah Branch	Renew existing ID card
Middle-aged professional Saudi woman	Mobile App	Report a stolen or missing card
Male Professional Expat	Call Center	Report an error on ID card

Scenarios are either Inquiry-based (posing questions or problems) or Transaction-based (involving the purchase of a service). Transaction-based scenarios allow testing all aspects of service delivery including overall service processing time and service outcome quality.

To draft a scenario, **pick a key beneficiary segment** and **build a story around how he/she obtains or inquires about a particular service** offered by the government entity **at one or more channels**

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Illustrative Example

The below presents hypothetical mystery shopping visit plan (illustrative) based on the number of visits determined for each channel and scenario.

Plan Example – Developing a Mystery Shopping Visit Plan by Services

1

Channel	Location	Service	Scenario	Required Beneficiary Profile	Time of the Visit / Call	No. of visits
Service Center	Riyadh Branch	Renew national ID card	You are looking to renew your national ID card…	Self-Employed Elderly Saudi Male	Thursday 12pm	3
Service Center	Riyadh Branch	Request for a new identity card	You are requesting for a new identity card…	Young Saudi Student	Thursday 12pm	2
Service Center	Makkah Branch	Report an error on ID card	You have lost your national ID card…	Middle-aged professional Saudi woman	Monday 1pm	1
Call Center	Call Center (800-)	Report a stolen or missing card	You have identified your name has been misspelt on your ID car…	Male Professional Expat	Sunday 6pm	2

Measure
Scope
Sample Size
Analyze
Execution Plan
Report
Questionnaire
Improve
Shopper briefing
Pilot

!

To stress-test accuracy of the visit plan, use the following criteria:

1. Each **visit to the same channel** is **conducted by a different mystery shopper and a different beneficiary profile**
2. **No two visits** to the same channel are **carried out at the same time**
3. Each scenario is conducted by at least **two different beneficiary profiles**
4. Each **physical channel is visited at least 7 times and each non-physical channel twice across peak and off-peak time**

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This step focuses on developing an execution plan for the mystery shopping exercise. The execution plan details all the activities that will be carried out under Plan, Measure, Analyze and Report steps. Factors which will influence the effort and timeline required for each step have been defined below:

Plan Execution Plan Development

1

Measure | Analyze | Report | Improve

Scope
Sample Size
Execution Plan
Questionnaire
Shopper briefing
Pilot

Stage	List Activities for each Stage	Factors Influencing Timeline	Expected Duration
Plan	• Design Questionnaire • Onboard Mystery Shoppers • Conduct Pilot Tests	• Questionnaire development • Selecting and onboarding mystery shopper • Conducting pilot tests	4 - 5 weeks
Measure	• Execute Mystery Shopper Visits • Conduct Quality Assurance Checks	• Conducting mystery shopping visits • Conducting quality assurance activities	6 - 10 weeks (depends on the number of visits)
Analyze	• Consolidate and Process Mystery Shopping Data • Conduct Data Analysis and Derive Results	• Processing mystery shopping data • Conducting data analysis and deriving results	2-3 weeks (depends on the volume of data from visits)
Report	• Develop Mystery Shopping reports • Publish reports to targeted audience	• Developing mystery shopper reports • Publishing mystery shopper reports	1-2 weeks

Below are some guidelines to follow when planning activities under the execution plan:

1. Realistic: The timelines defined must be realistic and achievable given the underlying activities
2. Comprehensive: All activities under the Plan, Measure, Analyze and Report stages are covered by the plan
3. Accountability: Ownership of every activity and relevant KPIs in the execution plan is clearly defined

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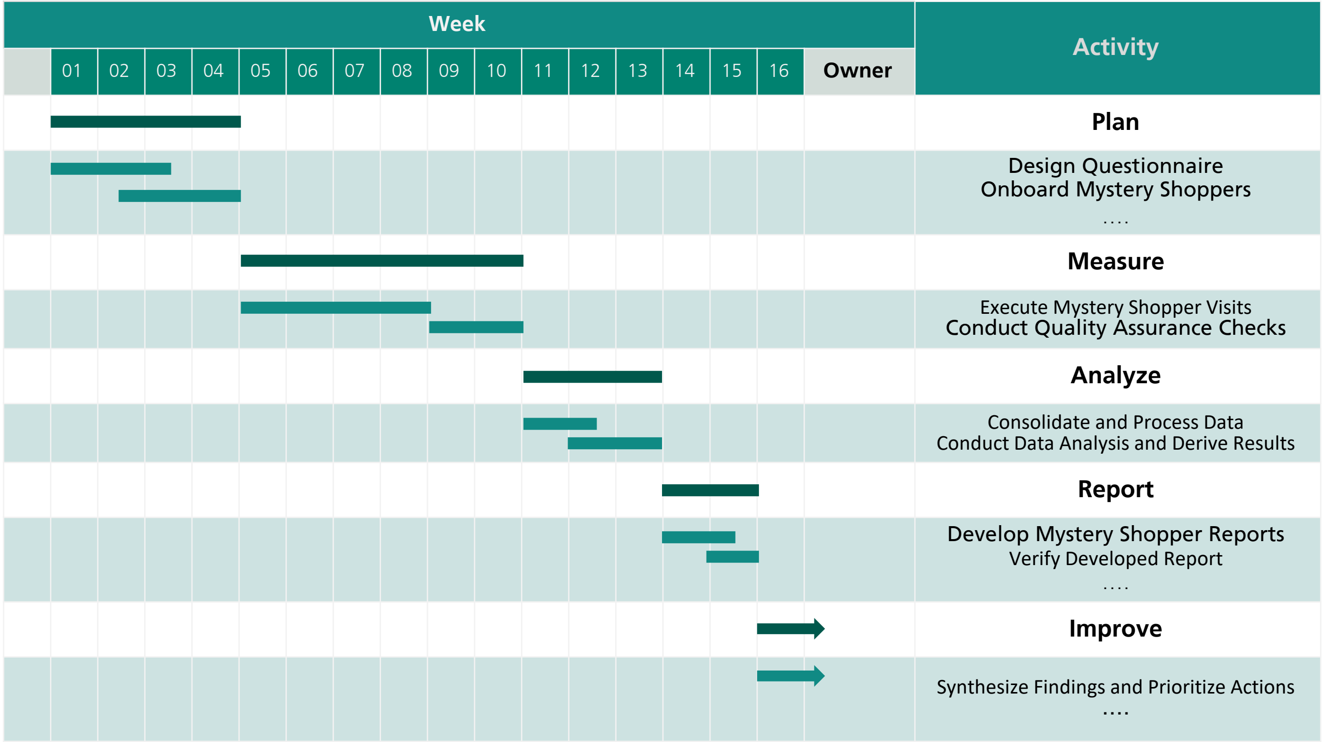
Plan

1

Measure
Analyze
Report
Improve

Scope
Sample Size
Execution Plan
Questionnaire
Shopper briefing
Pilot

Typical Execution Plan for a Mystery Shopping Exercise



*The timelines above are indicative and subject to the number and type of visits planned for mystery shopping

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Pilot

Next, a mystery shopping questionnaire is designed. The focus is on gathering specific details throughout the service journey using close-ended (i.e. multiple choice) questions that can be analyzed quantitatively later.

The questionnaire is divided into three sections:

The questionnaire is divided into three sections:

1. Information on the Mystery Shopper's Visit
2. Compliance Drivers Questions
3. Open-ended Questions

1 Information on the Mystery Shopper's Visit

Scenario

Select the scenario enacted by the mystery shopper from the options given

Time and Visit

Log the time, date and duration of the mystery shopper visit

Channel

Select the channel of mystery shopping visit from the options given

Beneficiary Segment

List the segment represented by the mystery shopper (i.e. Age, Gender, Income, Ethnicity)

Section 2: Compliance Drivers Questions

This section includes the actual questions that the mystery shopper will answer to provide feedback on service quality. The questions should take into consideration 3 components: (i). Compliance Drivers, (ii). Scale and score of responses, and (iii) Weighting of each driver

*The timelines above are indicative and subject to the number and type of visits planned for mystery shopping

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1-1

(1) Compliance drivers

Drivers and sub-drivers are the areas that cover different aspects of service quality.
Based on the drivers used by global benchmarks, 5 standard drivers have been selected. Depending on whether the visit is conducted on physical, digital or call center, different drivers would apply.

Applicable Channel	Drivers	Description
Physical, Digital and Phone channels	Procedures	Assesses the availability of information about the service and the ease to consume the service
	Timeliness	Evaluates the total time taken, as well as, time spent waiting in queues or on call by beneficiaries when consuming the service
	Service Outcome	Assesses whether the service was consistently delivered in line with the service's promise, and if the end-product satisfies the needs of beneficiaries
Physical	Channel (Physical)	Evaluates the effort made by beneficiaries to access the physical facilities, its cleanliness, appearance and appeal as perceived by the beneficiary
	Staff	Evaluates the beneficiary's view of the staff's know-how, as well as, whether staff dealt with the beneficiary in a polite and respectful manner
Phone	Staff	Evaluates the beneficiary's view of the staff's know-how, as well as, whether staff was polite and respectful manner over the phone
Digital	Channel (Digital)	Assesses the quality, appearance, ease of use and access of digital channels

Moreover, depending on the service and sector, add or refine drivers or sub-drivers of compliance, which should be tested.

Below are examples of questions corresponding to each drivers and sub-driver of compliance.

Drivers of Service Quality	Sub-Drivers of Service Quality	Sample Questions
Procedures	• Availability of information • Ease of process	• Is the information on service available in both English and Arabic? • …
Channel	• Cleanliness/appearance • Condition/design • Ease of access/use	• Is there signage available to navigate to the service center? • Is free WiFi provided in the service center? • Is there information available on the service on the website? • …
Staff	• Staff know-how • Staff courtesy	• Did the staff greet when you entered the service center? • Did the staff provide information on the documentation required? • …
Timeliness	• Service processing time • Waiting time throughout the process	• How long did you have to wait to be served at the service center? • …
Service Outcome	• Quality of service outcome • Consistency of outcome	• Did you receive the service outcome you were promised? • ….

! Use the **5 standard drivers as baseline** to **refine or add new drivers** or sub-drivers, which are **specific to a service**, **sector or channel**

(2) Scale and score of responses

For each driver of compliance identified, design specific question(s) which can be answered by a simple Yes or No. Therefore, it is key to ensure the questions are objective and test a defined service standard or KPI.

Examples – Determine Scale and Score of Responses for Closed-ended Questions

Example of question testing **'Staff Courtesy'**:

Did the staff greet you when you entered the service center?

Yes	No
Score 100%	Score 0%

Next, the score for each response is determined to reflect level of compliance to the service standard, as explained in the example above. A 100% score implies full compliance to service standards, a 0% for no compliance at all.

However, depending on the driver being tested and variance in levels of compliance involved, responses can be scaled and scored at different levels – 3, 4 or 5. (Examples for different levels of compliance are provided on the next page.)

Design the questions which can be **answered with either a Yes or No** leaving no room for ambiguity, and assign each response a compliance score of **0% for non-compliance** or **100% for full-compliance** to service standard

Examples – Determine Scale and Score of Responses for Closed-ended Questions (contd.)

Example of question testing **'Timeliness'**:

How long did you wait to be served at the service center?

Less than 10 mins	Score: 100%
11 – 20 mins	Score: 50%
More than 20 mins	Score: 0%

In case a **driver of compliance involves various levels**, then the response choices can be increased between 3 and 5, and scores for each response adjusted accordingly

Plan

1

Measure | Analyze | Report | Improve

Scope | Sample Size | Execution Plan | **Questionnaire** | Shopper briefing | Pilot

(3) Weighting of each driver.

The weights will be assigned based on the weights the beneficiaries place on the different drivers, as identified during the beneficiary satisfaction survey analysis. Thus placing higher importance on the elements that are key to the beneficiary experience.

General guidelines on developing closed-ended questions

There are some general guidelines in forming questions for the mystery shopper questionnaire. These are listed below:

General Question Guidelines

Keep Questions Simple

Everyday words should be chosen that are easy for the mystery shoppers to understand

Use Yes/No Questions to the extent possible

The questions should use a yes or no style to the extent possible to maintain objectivity

Ensure Questions are Applicable

The questions should be relevant to the service or channel being tested

Ensure questions test a service KPI

Each question should aim to test a specific KPI related to a service

Avoid using Acronyms

Acronyms and abbreviations should be avoided or if commonly used explicitly defined

3 Open-ended Questions

In the last section, an open response text box is added where shoppers can provide more details with regards to their observations.

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In the next step, Mystery Shoppers are sourced externally, either through an external agency or department. When interviewing and selecting mystery shoppers for the exercise, considerations include:

Selection Criteria	Description
Profile Fit	The mystery shopper fits the demographic profile of the selected beneficiary segments (such as age, gender, ethnicity
Industry Knowledge	The mystery shopper has experience dealing with government entities, as well as, sector-specific knowledge required
Geographical Coverage	The mystery shopper is able to provide coverage to relevant geographical areas of focus for the exercise
Specialized Skillset	It is important to ensure that the mystery shopper fulfills any specialized requirements specific to a scenario

Ensure that the selected **mystery shopper's profile matches that of the beneficiary segment** and has **government service knowledge** as required

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Mystery shoppers are then prepared to act their scenarios and explained what areas to observe. To do so, a mystery shopping briefing note is developed, detailing how the scenario should be carried out. In preparing the mystery shopping briefing notes, the following elements should be kept in mind:

Guideline Theme	Description
Beneficiary Representation	Include tips on how to best role-play the traits of the represented beneficiary segment. This may include dress, language, a background story, or specific words to use or not to use
Journey Flow	Outline how to approach the staff, what to do or ask, and when. This can be explained in a chronological order of the service journey
Observations	Specify any observations that the mystery shopper needs to gather to be able to answer the questionnaire
Service-related SLAs*	Provide a high-level overview to the mystery shopper of the service KPIs including SLAs* associated with various aspects of the service, processes and channels involved

Test **mystery shoppers on the scenarios** to assess their understanding of the service aspects to be measured (i.e. service outcome, processes, SLAs) and gauge if the briefing has fulfilled its objective

*SLAs refer to Service Level Agreements, or more broadly service performance standards

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Pilot

Before conducting the mystery shopping exercise, it is important to carry out a brief pilot. Results of a pilot program will give an understanding of whether the questions have been designed appropriately to capture relevant information and the expected outcome is being derived without an issue.

To do so, a pilot should look to answer the following questions:

1. Is the questionnaire easy to follow?
2. Did scenarios enable mystery shoppers to test the key drivers of service quality?
3. Does the data gathered adequately measure compliance with service standards?
4. Does the visit plan allow for mystery shopping scenarios to be enacted as intended?

If one or more answers to the above is negative, the relevant aspects of the scenario, questionnaire or the mystery shopping visit plan would need to be revisited and refined accordingly.

Number of pilots

Depending on the scope of the exercise, it is recommended that at least two pilots are conducted, preferably testing the longest and most complex scenarios.

! Pilot **at least two pilot tests**, prioritizing **long** and **complex scenarios**

Measure

2

2.1: Execute Mystery Shopper Visits

2.2: Conduct Quality Assurance Checks

1-1 Execute Mystery Shopper Visits

Step Outputs	Step Overview
Completed Mystery Shopper Questionnaires	Once relevant trainings have been provided, mystery shoppers conduct the visits based on the execution plan and complete the mystery shopping questionnaires

2-2 Conduct Quality Assurance Checks

Step Outputs	Step Overview
Quality Control Implementation	Sample checks are conducted on the mystery shopping data received to validate the visit, by using one or more quality assurance techniques

Step Outputs   Step Overview

Deploy Mystery Shoppers and Monitor Plan

The mystery shoppers conduct visits based on the 'Mystery Shopping Visit Plan'. At the end of the visit, the mystery shoppers fill out questionnaire immediately. The completed questionnaires from the mystery shopping are compiled and reported to the government entity for monitoring.

Periodic status updates are conducted to monitor the plan, which is inclusive of:

Measure

2

2-1 MS Visits

2-2 QA Checks

- Completion rate and progress.
- Anticipated risks and challenges.
- Execution plan for pending activities.

While monitoring visits on a daily basis, checks must be conducted for the below:

1. The same shopper does not visit the same location twice during the same time.
2. Shopper profiles must alternate different demographic profiles (e.g., male and female) for every location and time of visit.

Before the end of the exercise, it is ensured that the guidelines set in the plan are achieved. In case of any selection bias or visit errors, additional mystery shopping visits shall be carried out to meet the plan.

Mystery Shopper Fieldwork in Service Center

- Q. Availability of Information on Service Center location
- Q. Ease of access to facility
- Q. Cleanliness and Condition of the facility
- Q. Staff Know-how and Courtesy
- Q. Waiting time throughout the process and Ease of process
- Q. Quality of the service outcome
- Q. Consistency of outcome with promised procedure
- Q. Service processing time

1 Plan
Measure
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2-1 MS Visits
2-2 QA Checks
3 Analyze
4 Report
5 Improve

Quality assurance is carried out to ensure that the mystery shopping visits were conducted properly and the risk of data falsification is minimized. A strong governance and oversight is required.

Quality Assurance Checks

There are a number of ways to conduct quality assurance analysis, a few of these are listed below:

Media

Mystery shoppers captures photographs, videos (whenever applicable) or audio recordings as proof of their visit

Location

In the case of physical channels, mystery shoppers validate the location and address of the store with their GPS

Joint Visits

Participate in fieldwork activities on 10% of the total number of visits to perform quality assurance checks

Evidence

Mystery Shoppers bring back proof of visits in the form of tokens from queuing system or brochures from the service center

It is important to conduct a quality assurance check to ensure that the 'Mystery Shopping Visit Plan' was followed by each mystery shopper, and there was no bias or in selecting the channels for visit, which could cause misrepresent the data.

Analyze

3

3.1: Consolidate and Process Data
3.2: Conduct Data Analysis and Derive Results

Quality assurance is carried out to ensure that the mystery shopping visits were conducted properly and the risk of data falsification is minimized. A strong governance and oversight is required.

Quality Assurance Checks

There are a number of ways to conduct quality assurance analysis, a few of these are listed below:

3.1 Consolidate and Process

Cleansed Mystery Shopping Dataset	Once relevant trainings have been provided, mystery shoppers conduct the visits based on the execution plan and complete the mystery shopping questionnaires

3.2 Conduct Data Analysis and Derive Results

Service Compliance Score and areas of service non-compliance	Sample checks are conducted on the mystery shopping data received to validate the visit, by using one or more quality assurance techniques

Step Outputs | Step Overview

After the mystery shopper visits are completed, the questionnaires used to capture shoppers responses are consolidated by scenarios, channels, services and segments.

Example – Consolidation of Mystery Shopping Data

Visit 1
Completed questionnaire with channel details and feedback across compliance drivers

Visit 2
Completed questionnaire with channel details and feedback across compliance drivers

Visit 3
Completed questionnaire with channel details and feedback across compliance drivers

Visit n
Completed questionnaire with channel details and feedback across compliance drivers

Consolidate responses for all visits and drivers	Consolidate all Mystery Shopping Visits		
Consolidate responses related to a specific service	Consolidate Visits for Service 1	Consolidate Visits by Service 2	Consolidate Visits by Service n
Consolidate responses related to a specific channel	Consolidate Visits for Channel 1	Consolidate Visits for Channel 2	Consolidate Visits for Channel n

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Mystery shoppers submit their feedback digitally and data is consolidated instantly. Once the dataset has been consolidated, it is reviewed for data quality. This step focuses on identifying and correcting erroneous and missing values in the consolidated dataset.

Typical data integrity errors are:

- **Value and Format Errors:** The actual value does not correspond to the values defined in the questionnaire (i.e. Time of visit of the service center is "27 PM", Text instead of numerical values).
- **Missing Values**: Corresponds to questions or fields unanswered, or the results of an error when the data was consolidated.

If the data includes any of the above, then three measures are considered:

Data Integrity Measures

Defining Outliers

Identify and delete extreme values in data (up to 10% of either positive or negative values)

Remove and Replace Data

Identify errors in dataset and correct errors or replace data

Call Back

Call back the interviewer or beneficiary to revise what value was originally noted

After cleansing the dataset from errors and missing data, the next step is to identify and remove outliers from the dataset. An outlier is an observation that greatly differs from other values in a dataset.

1 Plan
2 Measure
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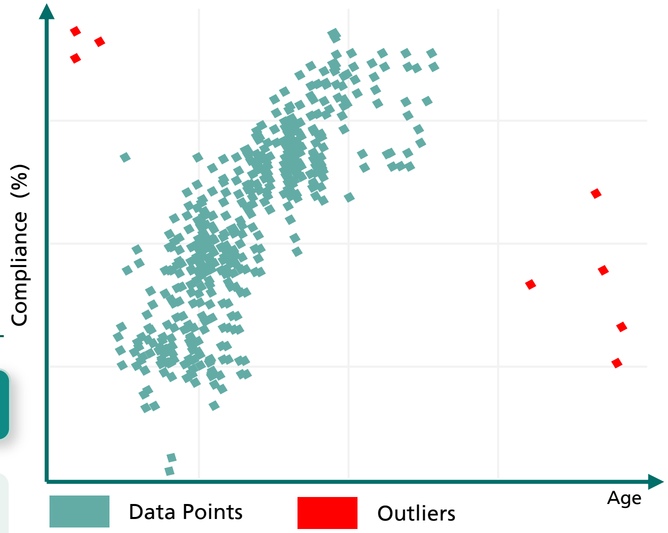
3-1 Process Data
3-2 Derive Results
4 Report
5 Improve

Example



Outliers are typically extreme values found in a dataset. The above graph clearly shows that the 5 outlier beneficiaries represent a group that is substantially different from the rest

When outliers are identified, they usually reflect any of the below:

- **Errors in Data**: Certain outliers with extreme values might reflect an error made during data entry
- **Out of Scope Distribution**: The outlier might not be part of scope of research (e.g., service center visited during an hour that was out scope for the exercise)

If outliers are found to be less than 90% of the remaining data points, they are considered for removal

This step is critical to the mystery shopping exercise, since it ensures the data points are similar enough to allow for patterns and relationships to be identified during the analysis phase.

Once the dataset is processed, it is ready for analysis.

This step consists of conducting standard analysis on the feedback of mystery shoppers

to calculate compliance scores over one dimension. **(Level 1)**

explore service compliance scores across multiple dimensions. **(Level 2)**

and finally analyze open ended questions and feedback. **(Level 3)**

Level 3

Analysis of Open-Ended Qualitative Feedback
Conduct an analysis of open-ended questions feedback, manually by filtering compliance scores, or using analysis techniques such as sentiment analysis and Word cloud visualizations

Level 2

Service quality assessment
Compute and analyze the service compliance scores/ operational KPIs score in combination with satisfaction measures to identify the impact of expectations on beneficiary experience

Level 1

One-Dimensional Compliance Score
Calculate and interpret the service compliance score against individual dimensions (i.e. Drivers of quality, channels, beneficiary segments)

Level 1: Compliance Score over single dimensions

The first analysis requires calculating the Compliance Score is a weighted average score that is derived using the various score percentages placed on each response in the questionnaire.

1. Multiply the response score with its assigned weight* (equal weights for all questions under a given driver)
2. Add up the weighted response scores for all questions under each driver
3. Multiply this sum of all weighted response scores with the weightage of the driver
4. Add up all the weighted values at the driver level to deduce the compliance score for each visit

(An equal weightage for all drivers of service is assigned to all the drivers, unless the entity has defined weightage on the drivers of compliance through research)

Compliance Score = average of all compliance rates scored

Service Compliance Scores against individual dimensions

Overall Service Compliance Score

What is the overall beneficiary compliance score with the services or the journey?

Drivers

What is the service compliance against the drivers? (Procedures, Staff, Physical Location, Digital Channel, Timeliness, Service Outcome)

Channels

What is the service compliance against the channels? (Physical Location, Website, Mobile Application)

Beneficiary Segments

What is the service compliance against beneficiary segment? (i.e. Citizens, Residents)

Example – Calculating the Compliance Score

Compliance Score = average of all compliance rates scored

Compliance Score for Individual Visits
58
65
67
76
62
79
65
67
63

Overall Compliance Score

%66

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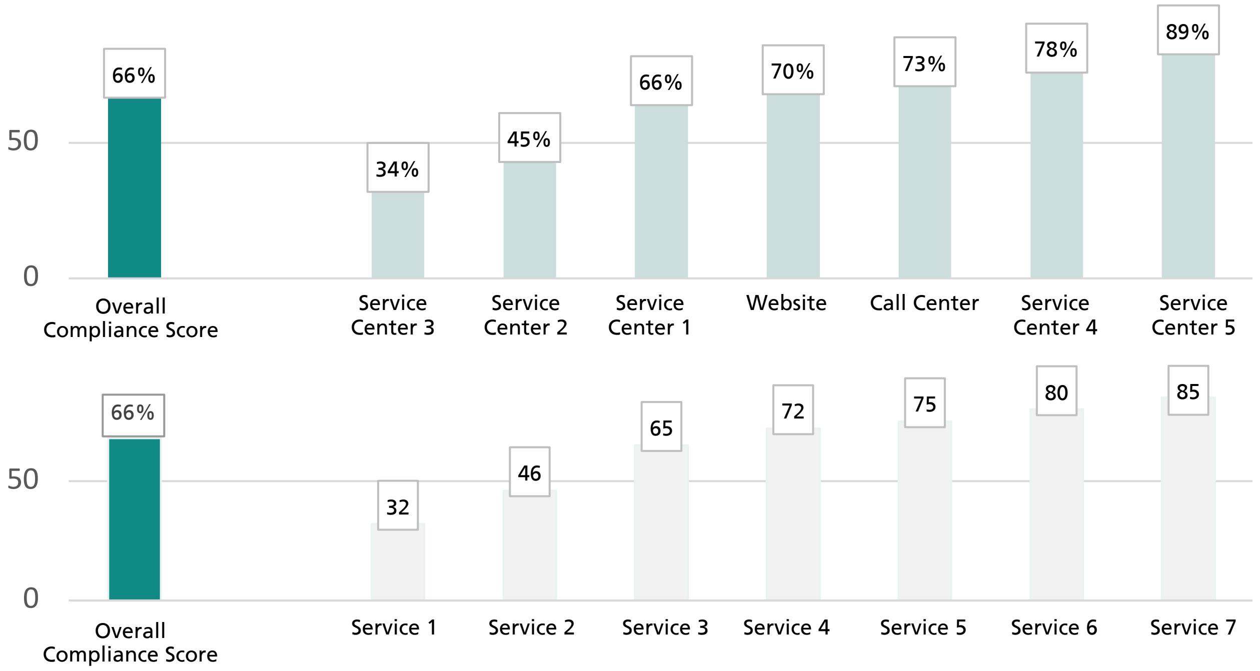
Measure
Analyze
3
3-1 Process Data
3-2 Derive Results
Report
Improve

Example – Compliance Score by Channels and Services



A trend analysis of the compliance score should be conducted to evaluate changes in the score over a period of time.

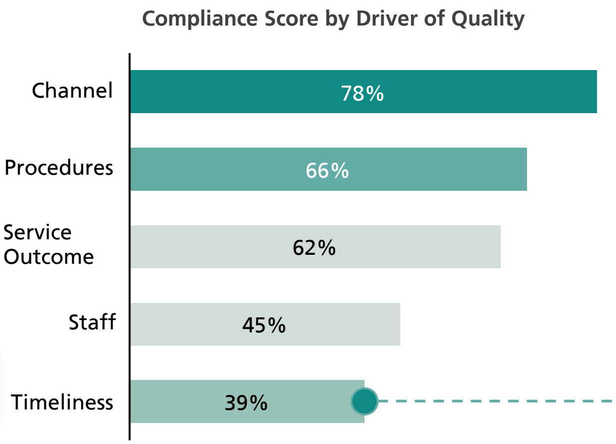
VOB Method: Mystery Shopping | Stage 3: Analyze – (3.2) Conduct Data Analysis and Derive Results

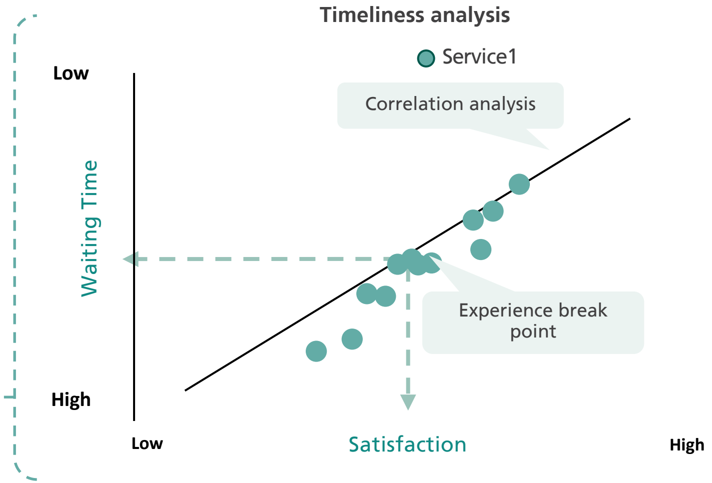
1 Plan
2 Measure
Analyze
3
3-1 Process Data
3-2 Derive Results
4 Report
5 Improve

Level 2: Service quality assessment

As a next step, the service compliance score (or operational KPIs if available) is further decomposed by drivers of service quality at a channel, service and beneficiary segment level. In combination with satisfaction measures this would help identify the impact of expectations on beneficiary experience

Example – Waiting time effect on satisfaction





*Correlation is the extent to which two distinct variables are related to each other

Level 3: Analysis of Open-Ended Qualitative Feedback

Moreover, responses to open-ended section are also studied to identify areas of strengths and weaknesses from the point of view of the mystery shopper.

Two approaches are defined to extract findings from responses to open ended questions:

- **Manual Review:** Review manually the feedback of mystery shoppers, especially for visits with low service compliance score to gain insight into the mystery shopper's experience and more details behind the rating on a specific question.

Example – Manual Assessment of Textual Feedback

In this form of analysis, shopper feedback is evaluated by looking at positive and negative sentiment differently. In this case the focus is on Staff performance

#	Staff Score	Feedback
1	%25	"…The staff seemed inconvenienced by my requests…"
2	%75	"…employees acted efficiently…"
3	%25	"…staff did not seem professional…"
4	%50	"…employees were impolite and unprofessional …"
5	%75	"…staff sounded knowledgeable…"

Findings

Positive Feedback	Negative Feedback
The positive feedback received focuses on the staff's know-how and ability to support beneficiaries. ("efficiently", "knowledgeable"	The negative feedback on stems from an attitude or professionalism problem ("inconvenienced, "not seem professional", "impolite")

*The first column (#) refers to the visit number – corresponds to each record/visit of mystery shoppers

- **Natural Language Analysis:** Leverage natural language processing (NLP) techniques to identify common key words used by the mystery shoppers

Example – Word Cloud Visualization

In this form of analysis, shopper feedback is evaluated by looking at positive and negative words. In the below example, the focus is on Staff performance.

#	Feedback
1	"…The staff seemed inconvenienced by my requests…"
2	"…employees acted efficiently…"
3	"…staff did not seem professional…"
4	"…employees were impolite and unprofessional …"
5	"…staff sounded knowledgeable…"

Analysis & Visualization

Specialized software will quantify sentiment, and generate word cloud visualizations

Word Clouds

Negative Sentiment/Weaknesses

" impolite " "bad service" "Unprofessional" "bad service" "Inconvenienced" " impolite " " Loud " " confused "

Most negative sentiment is focused on Staff attitude, behavior and professionalism

Positive Sentiment/Strengths

"Knowledgeable" "Efficient" "Supportive" "Effective" "Friendly" " Effective" "Amiable"

Positive sentiment focuses on the employees' know-how and ability in servicing beneficiaries

This analysis of open-ended responses is typically carried out to complement and validate the findings from the quantitative analysis.

Implementation Guidelines

VOB Method: Satisfaction Surveys

1 Satisfaction Surveys

2 Mystery Shopping

3 Focus Group

Beneficiary Experience Reports

VOB Method: Focus Groups | Introduction

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Focus Groups

A voice of beneficiary method that involves conducting a deep-dive on the beneficiary pain points as well as service improvement initiatives, through group discussions with beneficiary segments 'focused' around particular service dimensions

Who can do the research?

Conducted by independent moderators that are not related to the entity being assessed

Why is it used?

Used to conduct a deep-dive on key pain points and service improvement opportunities or to determine the drivers of satisfaction

How often is it implemented?

Conducted in the absence of sufficient data on drivers of satisfaction or for deep-dive into beneficiary pain points

Compliance Drivers

- Service Outcome*
- Timeliness*
- Physical/ Digital Channel
- Staff
- Procedures

*where applicable

Key Steps

1. **PLAN:** Define the approach, develop required materials and onboard moderators
2. **MEASURE:** Implement planned focus groups and conduct quality assurance checks
3. **ANALYZE:** Consolidate, process and analyze the focus group data

Measurement Objectives

- Explore pain points faced by beneficiaries and derive service improvement opportunities
- Understand the beneficiary's sector-specific drivers and sub-drivers of satisfaction with a service

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Plan

1

1.1: Define Scope of Study
1.2: Draft Scenarios
1.3: Develop Execution Plan
1.4: Design Questionnaires
1.5: Onboard Mystery Shopping

Measure

2

2.1: Execute Mystery shopping Visits
2.2: Conduct Quality Assurance Checks

Analyze

3

3.1: Consolidate and Process Data
3.2: Conduct Data Analysis and Derive Results

Report

4

Combined Beneficiary Experience report, integrating all VOB sources

Improve

5

Guidelines are set here; however, this stage is not part of Adaa's mandate

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Plan

1

1.1: Define Scope of Study

1.2: Draft Scenarios

1.3: Develop Execution Plan

1.4: Design Questionnaires

1.5: Onboard Mystery Shoppers

Define Scope of Study 1.1

Step Outputs	Step Overview
Mystery Shopping Scope	The scope of the mystery shopping exercise in terms of channels, beneficiary segments and services, is defined

Scenarios 1.2

Step Outputs	Step Overview
Mystery Shopping Scenarios	Scenarios are identified, which will be enacted by the mystery shoppers for channels, services and segments, which are in-scope

Develop Execution Plan 1.3

Step Outputs	Step Overview
Mystery Shoppers Execution Plan	An execution plan is developed comprising of all mystery shopper activities and their timelines

Design Questionnaires 1.4

Step Outputs	Step Overview
Mystery Shopper Questionnaires	A questionnaire is designed based on the drivers of service quality that need to be tested

Onboard Mystery Shoppers 1.5

Step Outputs	Step Overview
Mystery Shopper Briefing Notes	Mystery shoppers are selected and prepared to act their assigned scenarios with the help of briefing notes

Step Outputs

Step Overview

As a first step, the objective of conducting Focus Groups is determined. Two distinct objectives exist, depending on which scenario is applicable:

Plan

1

2 Measure
3 Analyze
4 Report
5 Improve

Scope 1-1
Execution Plan 2-1
Script 3-1
Moderator Briefing 4-1
Pilot 5-1

Focus Groups Objectives

1 Deep Dive into Pain Points

Explore pain points faced by beneficiaries during interactions with the entity and potential areas of service improvement from a beneficiary's perspective

Applicable when…

There is a need to **deep-dive into certain pain points** and **service improvement opportunities**, on known drivers of satisfaction, which have scored low

2 Determine Drivers & Sub-Drivers of Satisfaction

Conduct workshops with beneficiaries to learn what are the key sector-specific drivers and sub-drivers of their satisfaction with a particular service or channel provided by the entity

Applicable when…

There is **limited or no information** available on **what elements of a service drives beneficiary's satisfaction**, especially in specific sectors

After determining the objective of focus groups, the scope of the exercise is defined.

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2 Measure
3 Analyze
4 Report
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Scope 1-1
Execution Plan 2-1
Script 3-1
Moderator Briefing 4-1
Pilot 5-1

Selection Criteria

Services

What services should the focus groups cover?

Core Service
Service is critical to government operations

Transactional Volume
Service has a high % of the total volume of services

Low Satisfaction
The service has a low satisfaction score (applies to pain points deep-dive)

Segments

What beneficiary segments should be part of scope for the focus groups?

Demographic characteristics
Segments are determined based on the demographic characteristics needed to satisfy the study objectives

Low Satisfaction
The beneficiary segment has reported a low satisfaction score (applies to pain points deep-dive)

Channels

Which channels should be evaluated by focus groups?

Geographic Coverage
Service center covers a large geographical area

Transactional Volume
Service center has a high % of the total volume of services

If the objective is to 'Deep Dive into Pain Points', then the driver(s) or sub-driver(s) of satisfaction of focus are also identified based on:

Drivers of Satisfaction

Which drivers of satisfaction should be of focus? (e.g., Staff, Timeliness, Physical Location)?

Lower than Average Satisfaction Score
The satisfaction score of the driver or sub-driver is lower than average score

Significant Drop in Satisfaction Score
The satisfaction score of the driver or sub-driver is decreasing over time

As a next step, the number of focus groups that would be conducted and the number of participants per focus group is determined, along with setting up an execution plan.

Plan

1

- 1-1 Scope
- 2-1 Execution Plan
- 3-1 Script
- 4-1 Moderator Briefing
- 5-1 Pilot

2 Measure

3 Analyze

4 Report

5 Improve

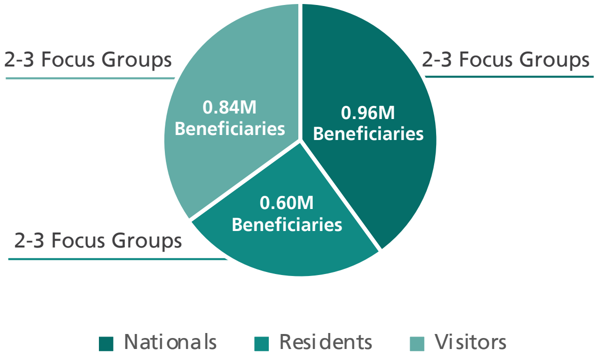
Number of Focus Groups

When identifying the number of focus groups are conducted, the population split is considered.

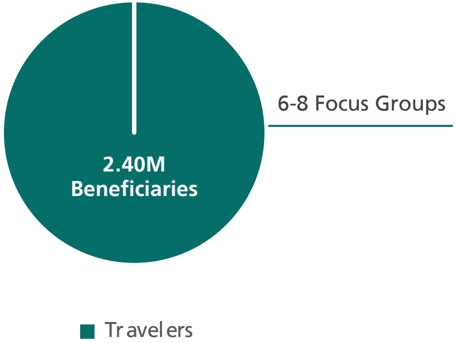
At least 6-8 focus groups need to be conducted over an entire population, with at least 2-3 focus group for each beneficiary segment

Example – Estimating the Number of Focus Groups for the Domestic Travel Journey

Segmented Traveler Population



Homogenous Traveler Population



As a next step, the number of focus groups that would be conducted and the number of participants per focus group is determined, along with setting up an execution plan.

Plan

1

2 Measure
3 Analyze
4 Report
5 Improve

Scope 1-1
Execution Plan 2-1
Script 3-1
Moderator Briefing 4-1
Pilot 5-1

Number of Participants in each Focus Group

Focus groups include 6-8 participants, which are part of either a single homogenous population or of one single beneficiary segment.
To ensure the expected attendance rate is covered, participants should be overrecruited by at least 20%.

Typically 6-8 participants should be part of each focus group, for which at least 8-10 beneficiaries should be contacted (>20% over recruitment rate)

Focus Groups Logistics

Considerations for focus groups logistics are as follows:

Focus Group Logistics

Focus Group Facilities

Facilities should have with video recording equipment

Focus Group Location

The location should be accessible to participants

Focus Group Duration

Facilities should have with video recording equipment

Focus Group Schedule

The schedule of focus groups to be conducted is prepared, highlighting beneficiary segment represented, expected and recruited along with location and moderators name:

Focus Group Schedule Template

Focus Group	Beneficiary Segment	Expected Participant Number	Recruited Participants	Date	Time	Location	Moderator Name	Assistant Moderator Name
1	Nationals - Male 20 - 40	10	8	23/9/2018	10:00 AM	Riyadh, Building A, Room 3	Mohammad A.	Omar B.
2	Nationals - Male 20 - 40	10	4	24/9/2018	4:00 PM	Jeddah, Building B, Room 1	Ahmad A.	Saleh H.
3	Nationals - Female 20 - 40	10	7	4/10/2018	11:00 AM	Jeddah, Building C, Room 4	Siham M.	Ayah. G
4	Nationals - Female 20 - 40	10	9	7/10/2018	12:30 PM	Khobar, Building F, Room 1	Noura C.	Riham A.

Plan

1

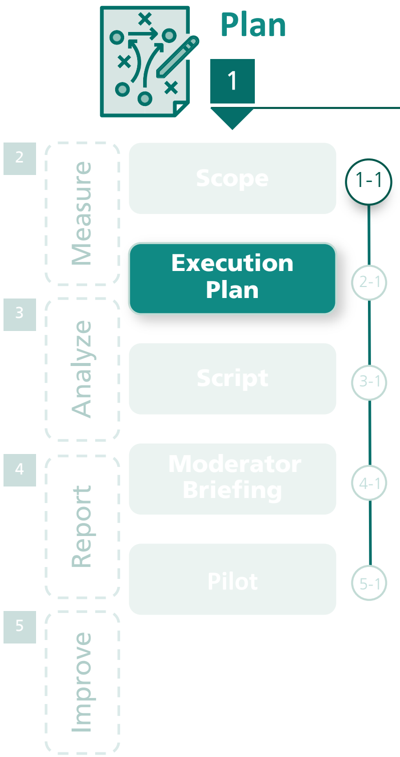
This step focuses on developing an execution plan for the Focus Group exercise. The execution plan details all the activities that will be carried out under Plan, Measure, Analyze and Report steps. Factors, which will influence the effort and timeline required for each step, have been defined below:

Execution Plan Development

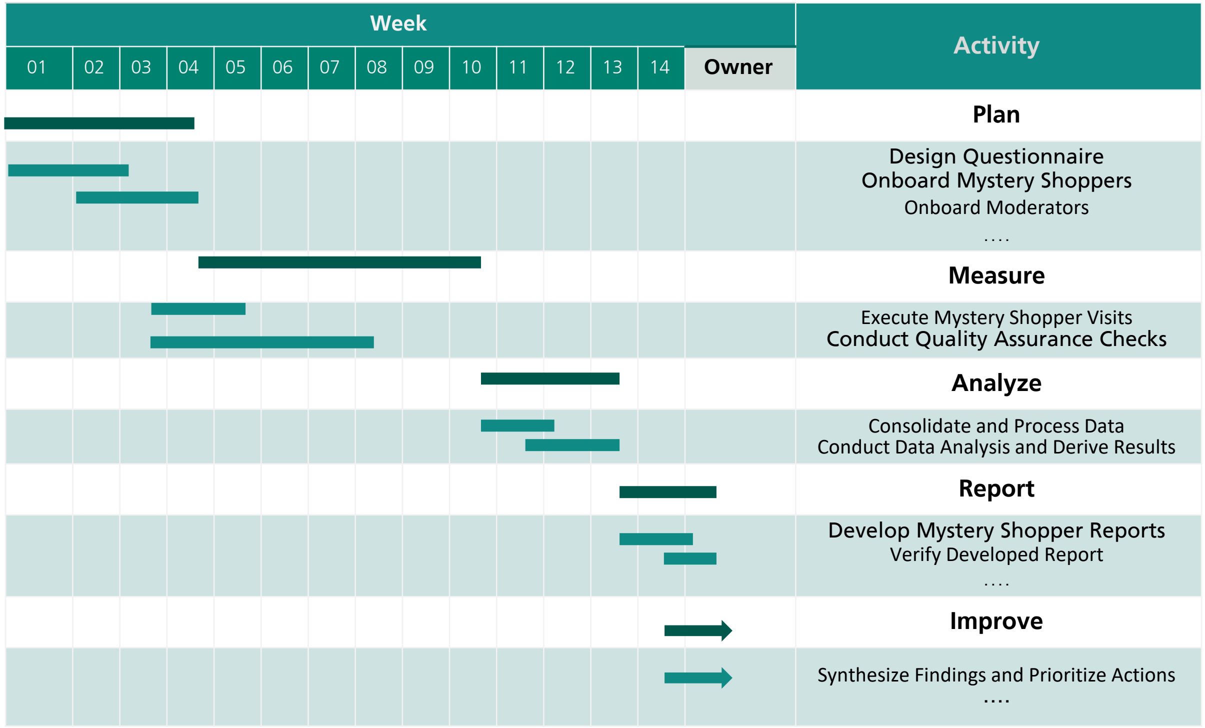
Stage	List Activities for each Stage	Factors Influencing Timeline	Expected Duration
Plan	• Design Focus Group Script • Onboard Moderators • Conduct Pilot Tests	Number of focus groups, number of participants, clarity on the dimensions of discussion	2 - 3 weeks
Measure	• Implement Focus Groups • Conduct Quality Assurance Checks	Number of focus groups, number of participants, geographic coverage, readiness of facilities	4 – 5 weeks (depends on the number of focus groups)
Analyze	• Consolidate and Process Focus Group Data • Conduct Data Analysis and Derive Results	Amount of focus group documentation, levels of analysis required	3-4 weeks (depends on the volume of data from focus groups)
Report	• Develop Focus Group reports • Publish reports to targeted audience	Number of reports, amount of study data to present	1-2 weeks

Below are some guidelines to follow when planning activities under the execution plan:

1. Realistic: The timelines defined must be realistic and achievable given the underlying activities
2. Comprehensive: All activities under the Plan, Measure, Analyze and Report stages are covered by the plan
3. Accountability: Ownership of every activity and relevant KPIs in the execution plan is clearly defined



Typical Execution Plan for a Mystery Shopping Exercise



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Plan

1

2 Measure
3 Analyze
4 Report
5 Improve

Scope 1-1
Execution Plan 2-1
Script 3-1
Moderator Briefing 4-1
Pilot 5-1

Next, a focus group script is designed. The script serves as a guide for moderators by providing relevant information on the objective and scope of the exercise, key topics and questions to ask, guidelines to moderate and manage the discussions.

The script consists of two main sections:

The script consists of two main sections:

1. Focus Group Introduction
2. Focus Group Questions

Section 1: Focus Group Introduction

The introduction provides a clear summary of the below topics:

Focus Group Introduction Components

Objectives and Scope
Describes the objectives of focus group

Beneficiary Segments
Defines who are the participants of the focus group

Themes
Describes the services being evaluated, as well as, key themes for discussion

Logistics
Defines the location and set up of the room, as well as the means of recording

Duration
Defines the time required to answer the questions

Confidentiality
Provides details on confidentiality and how data will be collected be used

Section 2: Focus Group Questions

If the objective is to deep dive into pain points, then each question corresponds to a given driver or sub-driver of satisfaction that has been found to have a low satisfaction score. For these, participants first discuss the key pain points experienced, then share their view on how that can be improved.

If the objective is to determine the sector-specific drivers and sub-drivers of satisfaction, then the questions would aim to explore what is most important to the beneficiary for a given service and what aspects of a service lead to their most dissatisfaction.

Example – Key Questions for Traveling and Arriving to the Kingdom

(Travelling with Saudi Airlines and Passport Control)

	Service	Questions for "Pain Points Deep Dive"	Questions for "Determining the Drivers"
S1	Travelling with Saudi Airlines	• When boarding the Saudi Airline flight, what were the areas of improvement that you feel are most needed? • Why do you feel the process was not easy to purchase tickets online?	• What are the aspects that matter to you most when traveling in the Saudi Airline flight? • What would frustrate you the most when booking your flight through the mobile application? • What would make your experience pleasant and pleasurable?
S2	Passport Control on Arrival to the Kingdom	• Why did you think the passport control was the biggest pain point? • What do you think would make your experience better with passport control?	• Is waiting time the most important aspect in the passport control stage? • Do staff know-how and attitude matter in your experience with the passport control officer? What other areas matter?

A focus group typically comprises of **8 to 12 questions** to ensure ample time is provided participants to think and revisit their experiences with the service

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Plan

1

2 Measure

3 Analyze

4 Report

5 Improve

1-1 Scope

2-1 Execution Plan

3-1 **Script**

4-1 Moderator Briefing

5-1 Pilot

When drafting focus group questions, the following criteria is applied:

- Short and Concise: Questions should **be short and self-explanatory**
- One-Dimensional: Each question should **cover only one driver or sub-driver or an aspect of a service**
- Unambiguously worded: The wording of questions **clearly explains the context and objective**
- Prompt rich responses: Questions are **open-ended** and incite the participants to think about their experiences

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Plan

1

2 Measure — 3 Analyze — 4 Report — 5 Improve

Scope (1-1)
Execution Plan (2-1)
Script (3-1)
Moderator Briefing (4-1)
Pilot (5-1)

To ensure moderators are equipped with the adequate skillset, candidates are evaluated against a criteria aimed at assessing moderator skill and personality.

Example: Moderator Qualification Criteria

Interviewer Attributes

Extroverted Personality

Moderators engage with participants in a sociable and friendly manner

Communication Skills

Moderators have strong verbal communication skills and are able to moderate discussions

Interview Experience

Moderators engage with participants in a sociable and friendly manner

Conduct **screening of potential moderators** by probing them about their **experience in conducting interviews** and gauge their **communication skills and personality**, as well as, conduct a **mock interview by providing them with a focus group questionnaire** to simulate an actual focus group

Plan

1

2 Measure
3 Analyze
4 Report
5 Improve

Scope
Execution Plan
Script
Moderator Briefing
Pilot

1-1
2-1
3-1
4-1
5-1

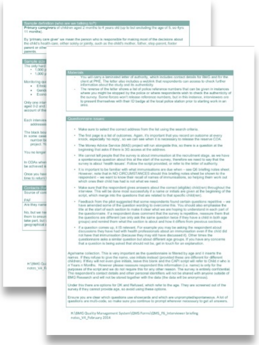
To have a clear alignment on the end goal of the exercise, a workshop is conducted to brief moderators on the defined scope. Moderators are then trained on how to engage participants based on the focus group objectives, questionnaire, as well as, general behavioral guidelines on how to carry out the exercise.

These guidelines are summarized in the moderator briefing notes and guidelines:

Moderator Training Material

Training Guidelines

What are the objectives of the focus groups?	How to probe pain points for sub-driver?
What journeys or services are evaluated?	How to explain questions to participants?
Who are the target beneficiary segments?	How to write comments and discussion points?
What satisfaction drivers are being evaluated?	How to probe for service improvement suggestions?
How to engage participants during focus groups?	How to moderate a successful focus group?
How and what to observe and pay attention to?	How to present oneself to participants?



Moderator Briefing Notes & Guidelines

Test a **randomly selected batch of moderators** by **probing them with questions** in relation to the sub-drivers and beneficiary segment of focus, as well as the discussion flow

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Before conducting the focus group exercise, it is important to carry out a brief pilot. Results of the pilot exercise will give an indication of whether the questions have been designed appropriately to capture relevant information and the expected outcome is being derived without an issue.

To do so, a pilot should look to answer the following questions:

Plan
1

2 Measure
3 Analyze
4 Report
5 Improve

Scope 1-1
Execution Plan 2-1
Script 3-1
Moderator Briefing 4-1
Pilot 5-1

Moderator Training Material

1. Are the questions easy to follow and are probing sufficient information in relation to drivers and sub-drivers of focus?
2. Did the questionnaire cover all sub-drivers and pain points of the beneficiaries?
3. Does data gathered in the pilot help explore beneficiary pain points and service improvement suggestions?

If one or more answers to the above is negative, the focus group questionnaire would need to be revisited and refined accordingly.

Number of pilots
Depending on the scope of the exercise, it is recommended that at least two pilots are conducted, preferably testing focus groups across key geographies and beneficiary segments.

! Pilot **at least two focus group sessions**

Measure

2

- 2.1: Implement Focus Groups
- 2.2: Conduct Quality Assurance Checks

2.1 Implement Focus Groups

Focus Group Recordings	Focus groups are conducted, in alignment with the execution plan, with recordings of the sessions shared with the relevant stakeholders

2.2 Conduct Quality Assurance Checks

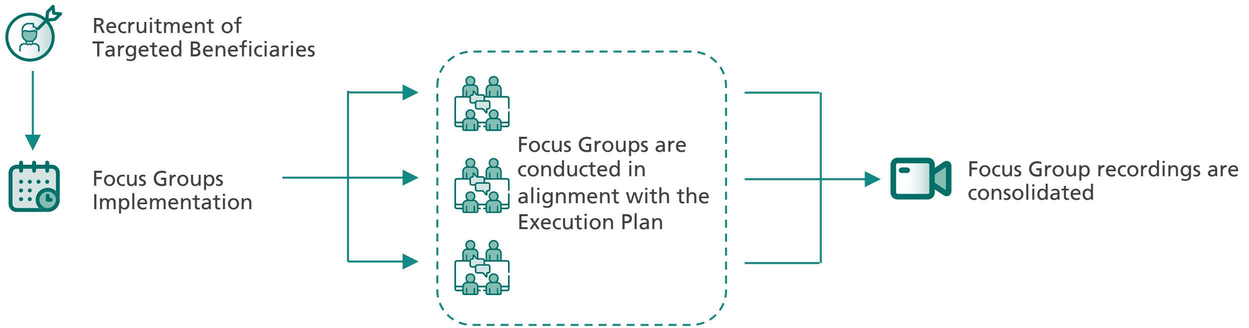
Quality Assurance Checks	Quality Assurance checks are conducted to ensure the focus groups are being conducted in alignment with the guidelines

Step Outputs | Step Overview

VOB Method: Focus Groups | Stage 2: Measure – (2.1) Implement Focus Groups

Targeted participants are contacted and recruited. Focus groups are then scheduled and conducted, in alignment with the execution plan, with the recording shared with stakeholders managing the exercise.

Focus Group Implementation



A status update report is created periodically, highlighting all focus groups completed against the plan and is shared amongst stakeholders. Any risks and issues are also highlighted in the report.

1 Plan
Measure
2
2-1 Focus Groups
2-2 QA Checks
3 Analyze
4 Report
5 Improve

The moderator prompts participants to introduce themselves and to create a open atmosphere in which participants openly share their experiences.

Introduction of Participants

Participant 1
- Name: Omar
- Age: 34
- Residence: Riyadh

…

Participant 2
- Name: Mohammad
- Age: 29
- Residence: Jeddah

…

Participant 3
- Name: Ahmad
- Age: 32
- Residence: Riyadh

…

Participant 4
- Name: Abdullah
- Age: 28
- Residence: Khobar

…

Participant N
- Name: …..
- Age: …..
- Residence: …..

…

To ensure the discussion includes all participants in the focus group, the moderator will have to deal with challenging participants that are either dominating the conversation or are reserved. Examples are outlined below:

Managing Challenging Participant Archetypes

The Self Appointed Expert	The Dominator	The Rambler	The Shy Participant	The Participant who Talks Quietly
Say “Thank you. What do other people think?”	Say “Let’s have some other comments.”	Stop eye contact and intervene as they pause	Make eye contact, call on them, smile at them	Ask them to repeat their response loudly

When engaging with participants, the moderator takes care of interacting objectively, without jeopardizing the inputs of participants, by orchestrating the group discussion.

Key Criteria for Focus Group Moderation

Moderation Guidelines

Probe and Investigate

Drive participant to share details of their experiences, focusing on the cause of dissatisfaction

Manage Group Dynamics

Organize the flow of the discussion, keeping in mind participant contribution and time

Listen Attentively

Pay close attention to the feedback of participants, including non-verbal cues such as facial expressions

Maintain Assertiveness

Influence the flow of conversation between participants by managing the flow of the discussion

Act Professionally

Maintain a professional and courteous behavior while engaging with participants at all times

Maintain Neutrality

Keep a neutral opinion, attitude as well as facial expression to avoid influencing responses

Closure

Before the end of the exercise, it is ensured that the execution plan for the focus groups has been met and all necessary data points, have been adequately covered. In case the scope is not entirely covered, additional focus groups shall be carried out to meet the plan.

Quality assurance is carried out to ensure that the focus groups were conducted properly and the risk of data falsification is minimized. Number of Quality Assurance Checks

The video recordings of the selected focus groups are reviewed for the following:

Quality Assurance Checks

Recordings

Obtain photographs, videos (whenever applicable) or audio recordings collected by interviewers as proof of their interview

Focus group completion forms

Validate completion of the focus groups related forms and templates (e.g., attendance sheet from the participants)

Moderator Performance

Review recordings to monitor the moderator did not lead the focus group and met the professional and behavioral standards

Joint Visits

Participate in 10% of the total focus group sessions to perform quality assurance checks

Call Backs

Contact 10% of the total participants after the interviews to verify their participation and completion of the interview

It is important to conduct these quality assurance check to ensure that the focus group schedule was followed. If the focus groups were found to not have been conducted in alignment with quality control guidelines, additional focus groups shall be conducted.

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Analyze

2

3.1: Consolidate and Process Data

3.2: Conduct Data Analysis and Derive Results

3.1 Consolidate and Process Data

Consolidated and Cleansed Dataset	Focus group recordings are consolidated into a structured and single set of data for analysis

3.2 Conduct Data Analysis and Derive Results

Analysis Findings	Focus group data is analyzed iteratively and findings across each question or sub-drivers by segments analyzed for common themes

Step Outputs | Step Overview

1 Plan

2 Measure

Analyze

3

3-1 Process Data

3-2 Derive Results

4 Report

5 Improve

Once the focus groups have been conducted, the recordings are collected and reviewed with the aim of identifying key findings around the service pain points and service improvement suggestions, or the suggested sector specific drivers and sub-drivers.

Example – Consolidation of Focus Group Data

Focus Group 1
Beneficiary Segment A

Focus Group 2
Beneficiary Segment B

Focus Group 3
Beneficiary Segment C

Focus Group N
Beneficiary Segment…

	Objective to Deep Dive into Pain Points: Consolidate all Focus Group Findings		Objective to Determine Drivers of Satisfaction: Consolidate all Focus Group Findings	
Consolidate responses for overall pain points / drivers of satisfaction				
Consolidate responses related to an existing driver / new suggested drivers	Consolidate pain point findings by existing driver or sub-driver 1	Consolidate pain point findings by existing driver or sub-driver 2	Consolidate findings by suggested driver 1	Consolidate findings by suggested driver 2
Consolidate responses by beneficiary segments / sub-drivers	Consolidate pain point findings by Segment A	Consolidate pain point findings by Segment B	Consolidate findings by suggested sub-driver 1	Consolidate findings by suggested sub-driver 2

1 Plan
2 Measure

Analyze

3

3-1 Process Data

3-2 Derive Results
4 Report
5 Improve

Each focus group session is reviewed in in detail and all beneficiary replies are logged as rows into a single tabular dataset, in which the following data points are outlined:

- **Focus Group Details:** Focus group reference number, date, time and location
- **Beneficiary Segment:** Demographic characteristics of segment (Gender, Age, Geography and other)
- **Question Themes:** Questions prompted by the moderator to the participants grouped into themes
- **Participant Name:** Name the beneficiary
- **Participant Response:** Quotes the participant's exact response. This data point is the main output of the dataset and is at the center of the analysis of the focus groups

Random checks of the processing step is conducted to ensure beneficiary feedback is adequately captured into the dataset.

Processing Focus Group Raw Output into a Structured Data Format

Input

Focus Group Recording

Focus Group Schedule

Review recordings…

…and capture in the dataset

Output

…	….	….	….
…	….	….	….
….	….	….	….
….	….	….	….

Focus Group Structured Dataset

Illustrative Example

Example – Traveling and Arriving to the Kingdom (Travelling with Saudi Airlines & Passport Control)

For objective 1. deep dive into pain points, the dataset is consolidated in the following format:

Focus Group Ref. no	Beneficiary Segment	Service	Participant	Question	Theme	Sub-Driver	Pain Points	Service Improvement Suggestions
A	Nationals - Male - 20 - 40	Passport Control on Arrival to the Kingdom	Participant A	"When interacting with the Passport Control agent, how was their attitude and behavior?"	Staff	Attitude of the Passport Control Staff	"…the officer was not welcoming at all, he did not even say a word, just laid out his hand asking for my passport…It really did not feel like coming back home…"	"…maybe having a trained supervisor oversee their work can change their attitude…"
B	Nationals - Male - 20 - 40	Passport Control on Arrival to the Kingdom	Participant D	"When interacting with the Passport Control agent, how was their attitude and behavior?"	Staff	Attitude of the Passport Control Staff	"…the officer was cold, and seemed busier with his phone than to check my passport… he never greeted me, and only asked me for my documents, without even making eye contact…"	"…they need to have better training for dealing with new passengers, they represent the face of the Kingdom since they are the first government officials visitors interact with…"
C	Nationals - Female - 20 - 40	Travelling with Saudi Airlines	Participant E	"When booking a flight with Saudi Airlines, how did you find the overall availability of flights?"	Procedure	Availability and Convenience of Flight Schedule	"…most regions are easy to book flights to, but whenever I want to visit my mother in Jeddah, there are almost never any flights available…I usually book weeks in advance…"	"…add more flights to Jeddah every month…"
D	Nationals - Female - 20 - 40	Travelling with Saudi Airlines	Participant B	"When booking a flight with Saudi Airlines, how did you find the overall availability of flights?"	Procedure	Availability and Convenience of Flight Schedule	"…I am finding it very hard to book flights to Dubai, there is almost never any flight available within a week's notice…"	"…Add flights between Dubai and Riyadh…"

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Illustrative Example

Example – Traveling and Arriving to the Kingdom (Travelling with Saudi Airlines & Passport Control)

For objective 2. determine drivers of satisfaction, the dataset is consolidated in the following format:

Focus Group Ref. no	Beneficiary Segment	Service	Participant	Question	Theme	Driver Suggestions	Sub-Driver Suggestions
A	Nationals - Male - 20 - 40	Passport Control on Arrival to the Kingdom	Participant A	"Do staff know-how and attitude matter in your experience with the passport control officer? What other areas matter?"	Staff	"Employees of passport control is the most important driver in my opinion"	".. especially employee friendliness and courtesy"
B	Nationals - Male - 20 - 40	Passport Control on Arrival to the Kingdom	Participant D	"Is waiting time the most important aspect in the passport control stage?"	Time	"timeliness matters to me but I wouldn't say it's the most important one"	".. If timeliness is taken into consideration, then I would say the time it takes to stamp my passport should not be more than 2 minutes"
C	Nationals - Female - 20 - 40	Travelling with Saudi Airlines	Participant E	"What are the aspects that matter to you most when traveling in the Saudi Airline flight?"	Physical	"how new the airline is really shows how much the airline cares about providing a good service to its customers"	"...in particular the comfort of the seating, the entertainment provided, and the food is what I care most about"
D	Nationals - Female - 20 - 40	Travelling with Saudi Airlines	Participant B	"What would make your experience pleasant and pleasurable?"	Digital	"I really think it makes a big difference for the airline to have a great mobile application.."	"... especially the look and feel and how easy they make it to purchase tickets and check the status of flights"

1 Plan
2 Measure
Analyze
3
3-1 Process Data
3-2 Derive Results
4 Report
5 Improve

Illustrative Example

Once the data has been processed and consolidated, two types of analysis are conducted: Pain Points Analysis or Sector-specific Driver Analysis from the perspective of the beneficiary.

Type 1

Pain Points Analysis

Review and analyze beneficiary feedback for every sub-driver of satisfaction, to identify and group pain points and service improvement suggestions across services and beneficiary segments

Type 2

Sector-Specific Drivers of Satisfaction Analysis

Review and analyze beneficiary feedback to identify the sector specific drivers and sub-drivers of satisfaction across services

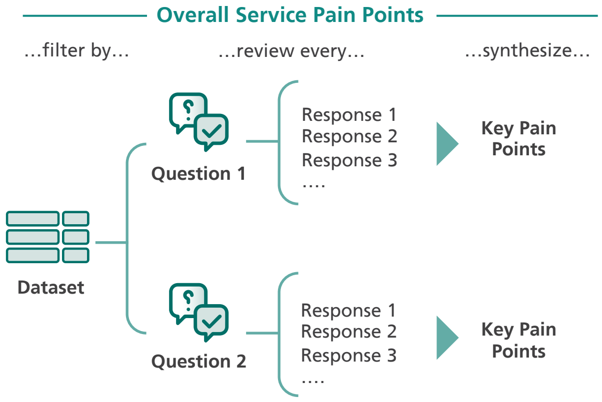
Illustrative Example

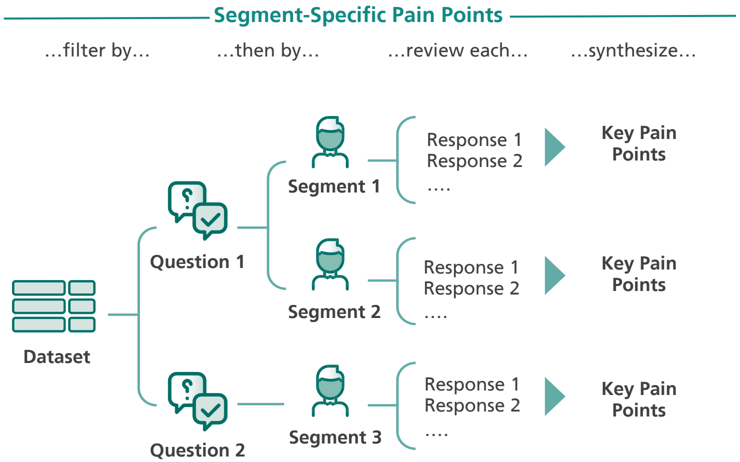
Type 1 : Pain Points Analysis

Once the data is defined in a structured format, each response is synthesized to identify common pain points and improvement opportunities across multiple focus groups and beneficiary segments. Key pain points are identified based on how many participants highlighted them. These are then used to identify service improvement initiatives.

The pain points shall be identified and grouped based on:

- Overall service pain points across all focus groups
- Pain points by each of the related beneficiary segments





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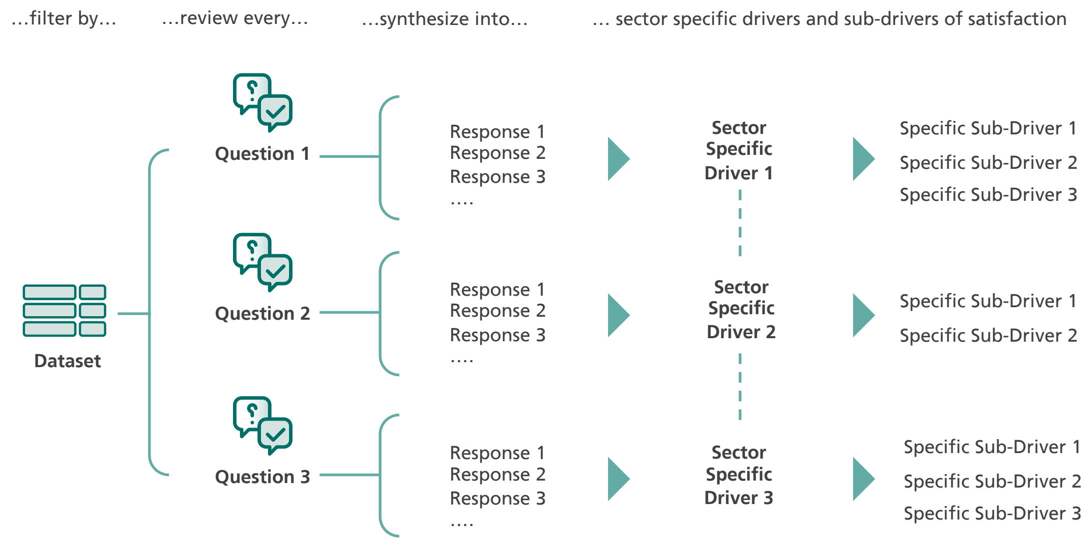
Illustrative Example

Type 2: Sector-Specific Drivers of Satisfaction Analysis

To determine the sector-specific drivers, the responses of participants, in terms of what matters most to them in each of the selected services, are analyzed. These are then grouped into sector-specific drivers and sub-drivers of satisfaction.

1 Plan
2 Measure
Analyze
3
3-1 Process Data
3-2 Derive Results
4 Report
5 Improve

Defining Sector-Specific Drivers of Satisfaction



Implementation Guidelines

VOB Method: Satisfaction Surveys

1 Satisfaction Surveys

2 Mystery Shopping

3 Focus Group

Beneficiary Experience Reports

Beneficiary Experience Reports

The Beneficiary Experience Reports share insights from quantitative beneficiary feedback and service quality measurements. The objective is to quantify and compare beneficiary experience levels across multiple services, drivers, and demographic dimensions

Drivers of Experience

- Satisfaction
- Service quality

How often is it implemented?

Implemented in a periodic and systematic manner

Why is it used?

Used to share they key findings on beneficiary experience and improvement areas and compare score trends over time

Who is it aimed at?

The reports are mainly aimed at the center of government and beneficiary service providing entities

Reporting Objectives

- Provide entities with knowledge to improve their beneficiary experience
- Support informed central decision making

Key Steps

4 **REPORT:** Consolidate findings, develop the survey report and socialize with key stakeholders

5 **IMPROVE:** Define and prioritize service improvement actions, develop action plan, then validate completion

VOB Method: Beneficiary Experience Reports | Overview of methodology stages and steps

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Planning measurement and analysis will collect insights from different VOB sources

1 Plan

2 Measure

3 Analyze

4 Report

4.1: Develop Beneficiary Experience Reports
4.2: Publish Beneficiary Experience Report

5 Improve

Guidelines are set here; however, this stage is not part of Adaa's mandate

5.1: Synthesize Findings and Prioritize Actions
5.2: Develop and Execute Action Plan
5.3 Validate Action Closure

Report

2

4.1: Develop Beneficiary Experience Reports

4.2: Publish Beneficiary Experience Report

4.1	Develop Beneficiary Experience Reports
Standardized Beneficiary Experience Reports	Standardized Beneficiary Experience Reports are developed, highlighting key metrics and areas of beneficiary experience measured

4.2	Publish Beneficiary Experience Report
Published Beneficiary Experience Reports	The Beneficiary Experience Reports are revised and shared with the relevant internal and external stakeholders, based on the defined VoB program governance plan

Step Outputs

Step Overview

After the planning, measurement and analysis through the different VOB, the fourth step involves consolidating findings and developing the reports synthesizing findings from satisfaction surveys, mystery shoppers and focus groups. To maintain consistency when reporting findings, a report template has been developed.

Report

4

4-1 Report

4-2 Publish

#	Section	Description
1	Introduction	Covers the objectives of the surveying exercise, the defined scope including services, channels and beneficiary segments that were focused on.
2	Methodology	Describes the planning and implementation of the research and how the VOB were conducted.
3	Executive summary	Includes the key findings of the report, overall beneficiary satisfaction scores, compliance scores and the hotspots for potential areas of improvement.
4	Detailed Analysis	**The analysis will be structured into three key sections:** • **Satisfaction:** Report the beneficiary satisfaction scores with the journey and the different services that are part of it • **Improvement areas:** hotspot analysis, root cause analysis and qualitative or other supporting data • **Vision 2030 affiliation:** correlation to vision 2030 initiative KPIs and link to Adaa initiative performance reports

Once the report has been developed and all documentation collated, the findings of the research are socialized amongst stakeholders. Two audiences are defined: Central Government and Public Entities, and the General public.

Beneficiary Experience Report Audiences

General Public

Share an executive summary report containing the overall satisfaction score and the satisfaction score of the services provided

Central Government & Public Entities

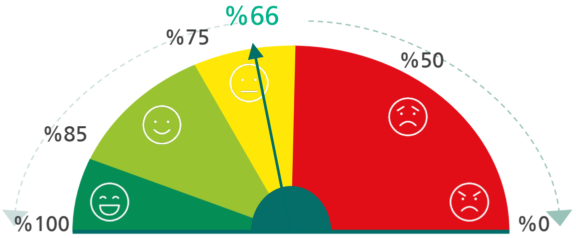
Share the executive summary and detailed report of findings from the Satisfaction Survey exercise

Three reports and guidelines for sharing information with each category of stakeholders are defined:

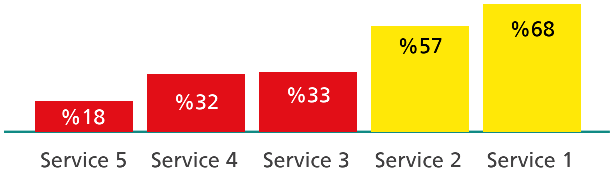
- **Central Government & Public Entities:** Develop an executive summary of findings, as well as a detailed report to be shared with the central government and public entities, in line with the governance reporting requirements
- **General Public**: Develop an executive summary report containing the overall satisfaction score and the satisfaction score of the services provided

Standardized Report Template for Satisfaction Survey – Central Government & Public Entities (Satisfaction)

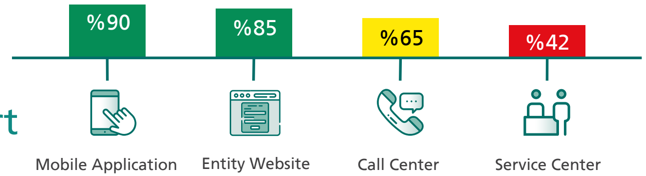
Overall Satisfaction



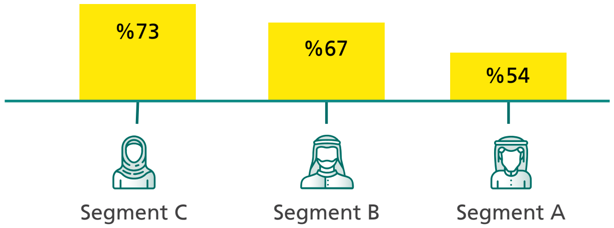
Satisfaction by Services



Satisfaction by Channels



Satisfaction by Segments

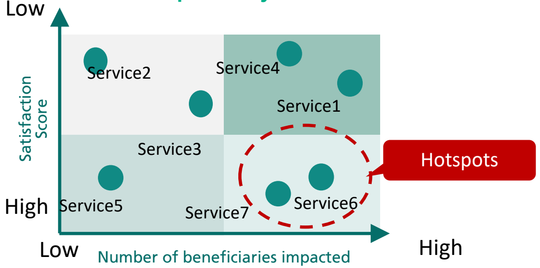


Key Findings

- The satisfaction score of 66% is driven down by Staff, Timeliness and Physical Location drivers
- Service Centers scored the lowest with 42%, signaling a potential need to focus improvement efforts
- Services 3, 4 and 5 scored the lowest amongst drivers, signaling a need to focus efforts on understanding root causes and improvement areas

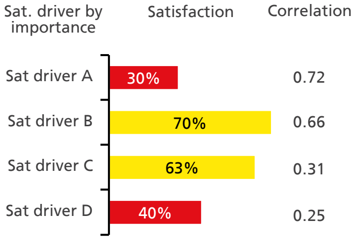
Standardized Report Template for Satisfaction Survey – Central Government & Public Entities (Improvement areas)

Hotspot analysis

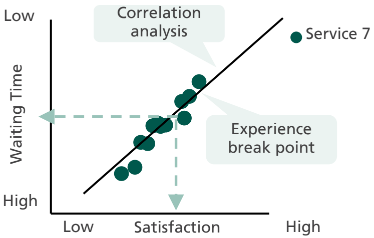


- **Quick wins** hotspots are services that have **low satisfaction** score, but affect **high number of beneficiaries**.
- **Strategic** hotspots are identified by having **low satisfaction score**, and **low beneficiary impact**
- Segment-specific hotspots are services that have **low satisfaction** score and impact **high number** of beneficiaries **within a specific beneficiary segment**

Satisfaction driver importance



Service quality impact



Perception polarity analysis

Time-series analysis

Sentiment analysis

Report

4

4-1 Report

4-2 Publish

Key Findings

- Services 6 & 7 show potential for improvement that would greatly impact beneficiary experience
- Service centers should focus on improving satisfaction driver A, due to it's low satisfaction score and high correlation with overall satisfaction
- For service 7 we know that the every minute we shorten from the waiting time will have a 8-10 p.p. impact on satisfaction

1 Plan
2 Measure
3 Analyze

Standardized Report Template for Satisfaction Survey – General Public Report

Segment A	73%
Segment B	67%
Segment C	54%

Satisfaction Results

Physical Location	42%
Mobile Application	90%
Call Center	65%
Website	85%

Report

4

4-1 Report
4-2 Publish

5 Improve

Satisfaction Scores from Beneficiary Surveys

Service Outcome	Timeliness	Channel	Staff	Procedures
33%	32%	68%	18%	57%

Improve

5

5.1: Synthesize Findings and Prioritize Actions

5.2: Develop and Execute Action Plan

5.3 Validate Action Closure

5.1 Synthesize and Prioritize Actions

Step Outputs	Step Overview
List of Prioritized Service Improvement initiatives	Based on the findings of the satisfaction surveys and other priority VoB methods, define and prioritize a long list of service improvement initiatives is identified

5.2 Develop and Execute an Action Plan

Step Outputs	Step Overview
Execution Plan for Prioritized Initiatives	For the prioritized initiatives, the associated activities, timelines and KPIs to measure success are detailed

5.3 Validate Action Closure

Step Outputs	Step Overview
Developed and shared report for completed initiatives	For the defined plan, follow-up and confirm initiatives have been completed, developing and sharing lessons learned report about the initiative's implementation

Step Outputs

Step Overview

The government entity identifies key findings from the exercise, groups them with findings from other VoB methods and derives service improvement initiatives, with the objective of improving beneficiary satisfaction. The findings may result in multiple initiatives. The following illustration outlines the necessary steps required to identify a long-list of improvement opportunities.

Example – Synthetize Beneficiary Experience Findings into Service Improvement Initiatives

Beneficiary Experience Findings

List down Beneficiary Experience findings

Finding #1:
Unresponsive mobile application

Finding #2:
Disrespectful staff behavior

Finding #3:
Unreliable staff

Finding #4:
Difficult to use website

Other VoB Methods Findings

List down findings from other methods

Focus Group

Mystery Shopping

Group Findings

Group findings based on common themes (e.g. satisfaction drivers)

Group #1:
Finding #4, #7,#13

Group #2:
Finding #1, #2, #12

Group #3:
Finding #3, #8, #9, #11

Group #4:
Finding #7, #5, #3, #15

Group #5:
Finding #1, #8, #10, #13

Group #6:
Finding #4, #5, #9, #18

Service Improvement Initiatives

Develop service improvement initiatives:

Initiative #1:
Revise Mobile application's user interface

Initiative #2:
Revise website navigation options

Initiative #3:
Retrain beneficiary-facing employees

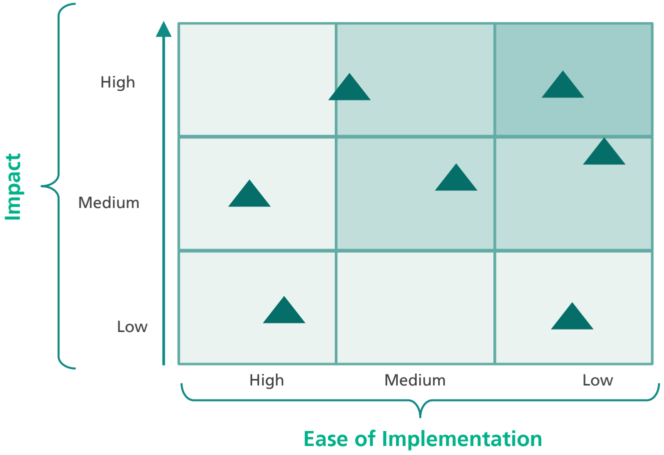
Initiative #4:
Improve documents processing time at service centers

Initiative #5:
Improve cleanliness of facilities

These service improvement initiatives are then prioritized for implementation based on their *Ease of Implementation* and their *Impact* against strategic objectives (e.g. Saudi Vision 2030, BEX department strategic objectives, Strategic KPIs). *Ease of Implementation* gauges the feasibility of the initiative, in terms of resources and costs, while *Impact* comprises of the return on investment and the number of times the finding has been repeated across all VoB methods.

Mapping these initiatives on a 3 x 3 matrix, based on these two criteria, helps prioritize actions from most critical, critical to less critical. As such, the most critical actions are short listed for implementation.

Example – 3 x 3 Prioritization Matrix



Prioritize High-impact and
Easy-to-implement initiatives

Prioritization conclusion

The initiatives that score "Most critical initiative" for each strategic objective should be prioritized for implementation

Recommendation

Based on the matrix, the most critical initiatives will be initiatives 4 and 7

Once initiatives have been prioritized, an action plan is developed and implemented and includes the following:

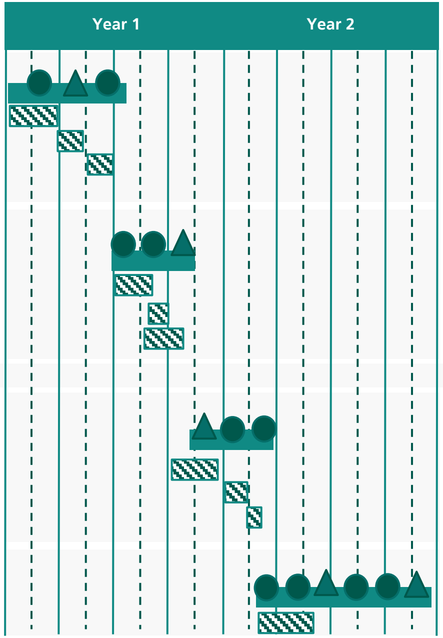
Step	Description
Assign Initiative Owners	The nature of the initiative will determine which team within the organization is best fit to own the implementation. For initiatives that have an entity-level scope, the internal PMO office or equivalent will be best to own the initiative, while for initiatives that have a service-level scope, the department responsible of providing the service will own the initiative.
Build an Execution Plan	A common tool to track progress of initiative implementation is a Gantt chart, which can be leveraged to develop an 'Initiative Execution Plan' (Please see next page for Gantt chart that provides a consolidated view on initiatives and underlying activities). The owner of the initiative identifies how frequently they would like to conduct a formal review of the initiative with internal and external stakeholders to ensure progress of activities is on track.
Define KPIs for every Activity	Key Performance indicators need to defined for each activity under the initiative to clearly define what is the criteria for completing an activity, and to measure progress against targets.
Execution Plan Review	The initiative execution plan will be updated on the basis of new findings from consequent surveying exercises that will be conducted. This would imply reprioritization of the initiatives based on their level of impact and benefit. However, ongoing initiatives should be carried out and completed as planned.

Example – KPIs for Activity – Enhance Staff Know-how

Example 1 - % of frontline staff trained and passed internal certification examination

Example 2 - % of knowledge sharing workshops conducted across different service centers

Example – Gantt Chart for Initiative Execution Plan Monitoring



Initiatives and Activities	Initiative Owner	KPIs	Planned Budget
Most Critical Initiative Initiative # 4 Activity # 4.1 Activity # 4.2 …	Owner 1	KPIs / Targets	Estimated Amount
Most Critical Initiative Initiative #7 Activity #7.1 Activity #7.2 …	Owner 2	KPIs / Targets	Estimated Amount
…			
Critical Initiative Initiative #2 Activity #2.1 Activity #2.2 …	Owner 3	KPIs / Targets	Estimated Amount
Critical Initiative Initiative #6 …	Owner 4	KPIs / Targets	Estimated Amount

Execution Plan Parameters

The execution plan covers in detail the following:

1. Initiatives and their relevant activities
2. The time frame to execute each window
3. Initiative Owner indicates the accountable department and responsible project manager
4. KPIs and targets for each activity
5. The planned budget for the initiative

Team Meetings
Milestones

Identify and Document Lessons Learned

Once the initiative is reported as completed, its owner documents the outcomes achieved and implementation pain points. This form of reporting ensures lessons learned are documented for future reference.

Lessons Learned Topics

Initiative Outcome

Define what are the outcomes of the initiatives, including which ones were achieved from the initial plan (i.e. 150 Employees retrained in customer service standards, 5 Facilities refurbished)

Implementation Pain Points

Identify pain points and learnings from implementing the initiative (i.e. Website revamp took considerably more time than predicted, Reducing waiting time at call centers requires a considerable increase in headcount)

Socialize Lessons Learned and Initiative Completion

After lessons learned have been documented and compiled, the findings are shared with the relevant stakeholders which include the central government, the entity's internal organization and the general public.

SECTION CONTENT

BEX Methodology Governance

The successful delivery of the BEX methodology requires a set of interactions across the stakeholder groups involved. In view of this, the interactions amongst the different stakeholders are outlined.

Additionally, the roles of Adaa and government entities in implementing the BEX methodology, the frequency of reporting for each method, and when each method is triggered have been detailed.

Finally, two levels of BEX reporting have been identified in order to provide the relevant insights to the various stakeholders.

Governance Model

Adaa
The National Center for Performance Measurement

1 Overall Stakeholder Roles

Interactions between stakeholders involved in implementing the BEX measurement, and the role of Adaa and public entities

2 Macro-Journey Level Measurement Frequency

Outputs and measurement frequency of BEX methods for macro-journey level reporting

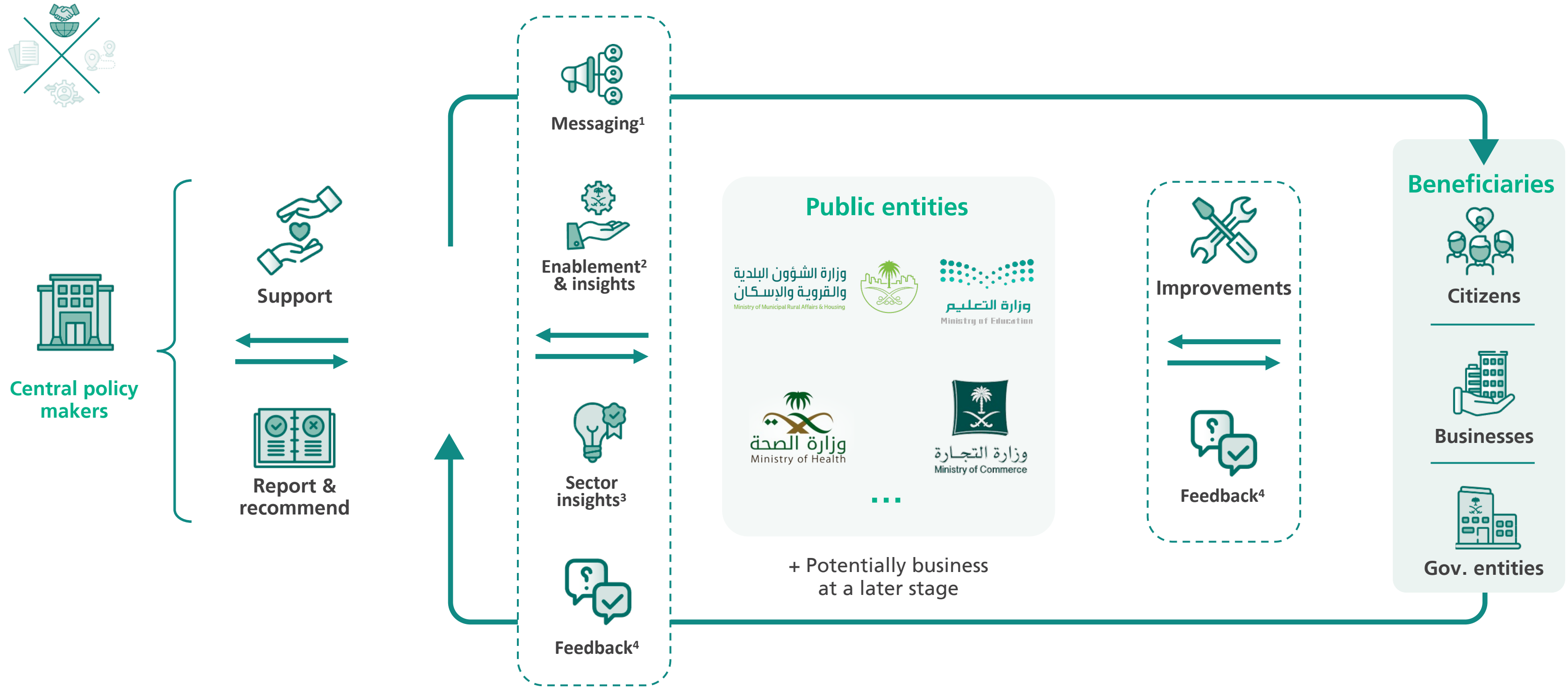
3 Entity Level Measurement Frequency

Outputs and measurement frequency of BEX methods for entity level reporting

4 Beneficiary Experience Reporting

The types of reporting for beneficiary experience reports outcome

Overall Stakeholder Map

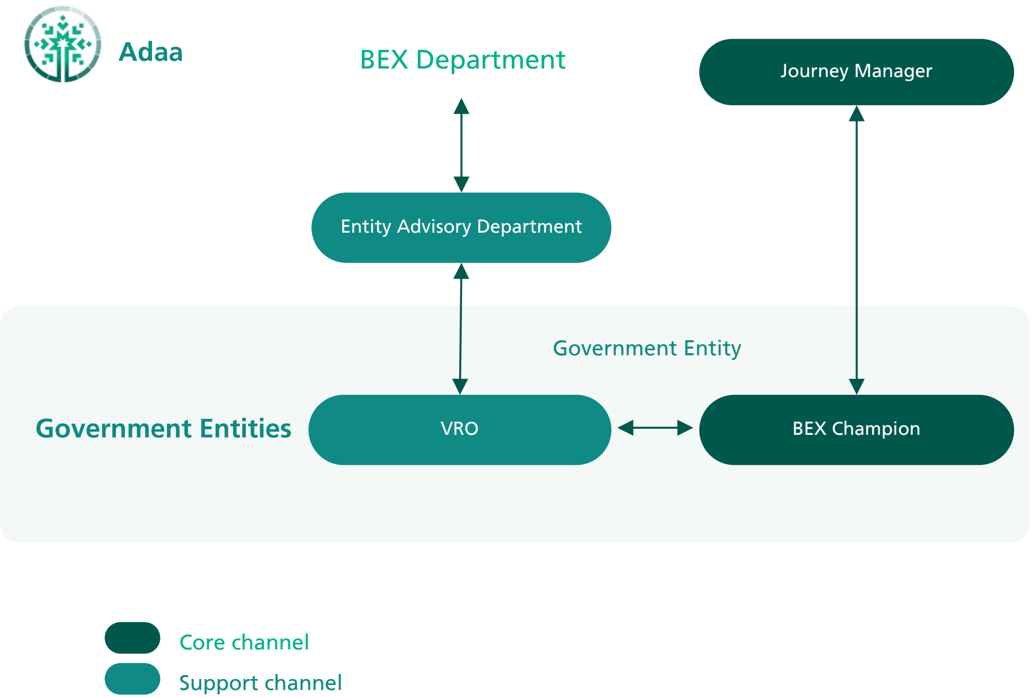


Core channel

Support channel

1. Communicate improvements launched based on provided feedback, 2. Provide framework and tools to execute Bex activities, 3. Report on results and share sector knowledge to co-create improvement solutions,4. Provide feedback on satisfaction with government services

Adaa Interactions with Government Entities



BEX Journey Manager: Drives the execution of the BEX methodology in coordination with BEX champions

EA Department: Manages the relationship with the Vision Realization Offices, handling escalation of issues (if any) for BEX measurement related matters

BEX Champions: Coordinate with Adaa in providing the required authorizations, sharing information around services and beneficiaries, and developing the government entity BEX capabilities

VRO: Coordinates with Entity Advisors and BEX champions, ensuring adequate support is provided to Adaa to support BEX measurement efforts

Official vs. Unofficial BEX Measurement

Unofficial Measurement

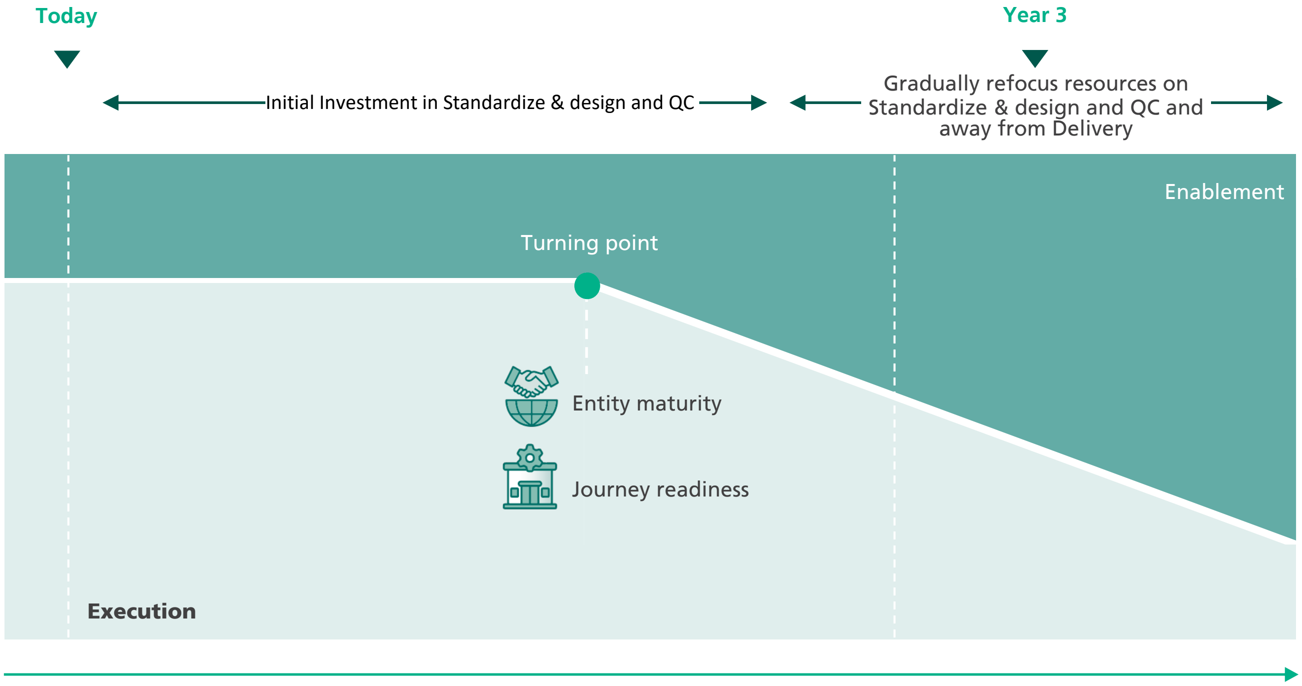
Internal measurement performed by the public entities that does not require compliance with the BEX Methodology, and shall not be published externally

Official Measurement

Measurement aligned with the BEX Methodology, implemented by ADAA and government entities, with reports approved by the Adaa Board, and published to related stakeholders

Detailed in the next pages

Official BEX Measurement Roles & Responsibilities ramp up



The definition of the turning point for each step of the experience improvement cycle will be based on the assessment of the maturity of public entities and journey readiness

Official Measurement – Roles & Responsibilities by Stage and Entity Maturity Level

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Maturity Level →

Stage 1
Low Maturity All by Adaa

Stage 2
Medium Maturity
Part by Adaa, Part by Entities

Stage 3
High Maturity All by Entities

<table>
<tr><th>VOB Stage</th><th>Adaa Role</th><th>Entity Role</th><th>Adaa Role</th><th>Entity Role</th><th>Adaa Role</th><th>Entity Role</th></tr>
<tr><td>Plan</td><td rowspan="4">Implement the set guidelines for each stage in the BEX Methodology</td><td rowspan="4">Provide data and support to Adaa as necessary</td><td rowspan="2">Conduct QA validation</td><td rowspan="2">Implement the set guidelines for each stage in the BEX Methodology</td><td rowspan="4">Conduct QA validation and approve before the entity proceeds to each of the next stages</td><td rowspan="4">Implement the set guidelines for each stage in the BEX Methodology</td></tr>
<tr><td>Measure</td></tr>
<tr><td>Analyze</td><td rowspan="2">Implement the set guidelines for each stage in the BEX Methodology</td><td rowspan="2">Provide input to Adaa as necessary</td></tr>
<tr><td>Report</td></tr>
<tr><td>Report</td><td colspan="2">Reports are published by Adaa</td><td colspan="2">Reports are published by Adaa</td><td colspan="2">Reports approved by Adaa, then published by Adaa and Entities</td></tr>
</table>

Official Measurement – Entity Level Roles & Responsibilities for Low Maturity Level

Adaa
The National Center for Performance Measurement

<table>
<tr><th rowspan="2">VoB Methods</th><th rowspan="2">VoB Stage</th><th rowspan="2">Method Steps</th><th colspan="4">Roles</th><th rowspan="2">Notes</th></tr>
<tr><th>A</th><th>R</th><th>C</th><th>I</th></tr>
<tr><td rowspan="9">Surveys
Mystery Shopper
Focus Groups</td><td rowspan="2">Plan</td><td>Completion of steps under ‘Plan’ stage</td><td>Adaa</td><td>Adaa</td><td>Entity</td><td>Entity</td><td rowspan="9">Adaa conducts all BEX Measurement Stages for Entities with low BEX maturity level</td></tr>
<tr><td>Quality Assurance checklist validation on ‘Plan’ steps</td><td>Adaa</td><td>Adaa</td><td>-</td><td>-</td></tr>
<tr><td rowspan="2">Measure</td><td>Completion of steps under ‘Measure’ stage</td><td>Adaa</td><td>Adaa</td><td>Entity</td><td>Entity</td></tr>
<tr><td>Quality Assurance checklist validation on ‘Measure’ steps</td><td>Adaa</td><td>Adaa</td><td>-</td><td>-</td></tr>
<tr><td rowspan="2">Analyze</td><td>Completion of steps under ‘Analyze’ stage</td><td>Adaa</td><td>Adaa</td><td>-</td><td>Entity</td></tr>
<tr><td>Quality Assurance checklist validation on ‘Analyze’ steps</td><td>Adaa</td><td>Adaa</td><td>-</td><td>-</td></tr>
<tr><td rowspan="3">Report</td><td>Completion of steps under ‘Report’ stage</td><td>Adaa</td><td>Adaa</td><td>-</td><td>Entity</td></tr>
<tr><td>Quality Assurance checklist validation on ‘Report’ steps</td><td>Adaa</td><td>Adaa</td><td>-</td><td>-</td></tr>
<tr><td>Publish Reports</td><td>Adaa</td><td>Adaa</td><td>-</td><td>Relevant Stakeholders</td></tr>
</table>

Official Measurement – Entity Level Roles & Responsibilities for Medium Maturity Level

VoB Methods	VoB Stage	Method Steps	Roles: A	Roles: R	Roles: C	Roles: I	Notes
Surveys Mystery Shopper Focus Groups*	Plan	Completion of steps under 'Plan' stage	Entity	Entity	Adaa	-	Entities would be responsible for conducting stages 1 and 2, with Adaa conducting QA validation checks. Adaa would then takeover and conduct stages 3 and 4.
		Quality Assurance checklist validation on 'Plan' steps	Adaa	Adaa	-	Entity	
	Measure	Completion of steps under 'Measure' stage	Entity	Entity	Adaa	-	
		Quality Assurance checklist validation on 'Measure' steps	Adaa	Adaa	-	Entity	
	Analyze	Completion of steps under 'Analyze' stage	Adaa	Adaa	-	Entity	
		Quality Assurance checklist validation on 'Analyze' steps	Adaa	Adaa	-	-	
	Report	Completion of steps under 'Report' stage	Adaa	Adaa	-	Entity	
		Quality Assurance checklist validation on 'Report' steps	Adaa	Adaa	-	-	
		Publish Reports	Adaa	Adaa	-	Relevant Stakeholders	

* Focus Groups are either fully implemented by Adaa (in case of low Entity maturity) or fully implemented by the Entity (in case of high Entity maturity)

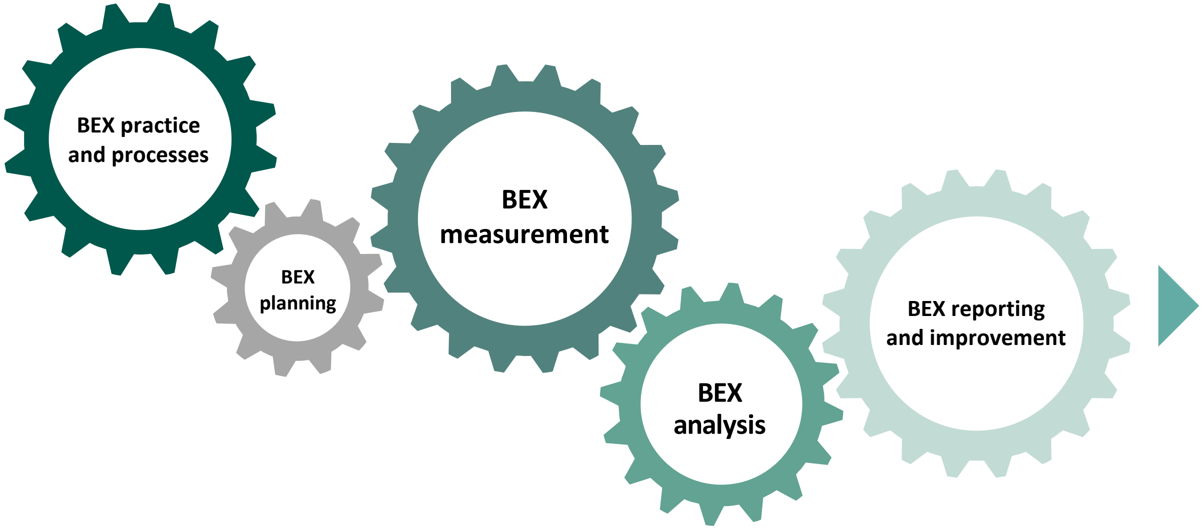
Official Measurement – Entity Level Roles & Responsibilities for High Maturity Level

VoB Methods	VoB Stage	Method Steps	Roles				Notes
			A	R	C	I	
Surveys Mystery Shopper Focus Groups	Plan	Completion of steps under 'Plan' stage	Entity	Entity	Adaa	-	Entities would be responsible to implement the guidelines across the four stages for each of the VOB methods, while Adaa would conduct QA validation checks after the completion of each stage.
		Quality Assurance checklist validation on 'Plan' steps	Adaa	Adaa	-	Entity	
	Measure	Completion of steps under 'Measure' stage	Entity	Entity	Adaa	-	
		Quality Assurance checklist validation on 'Measure' steps	Adaa	Adaa	-	Entity	
	Analyze	Completion of steps under 'Analyze' stage	Entity	Entity	Adaa	-	
		Quality Assurance checklist validation on 'Analyze' steps	Adaa	Adaa	-	Entity	
	Report	Completion of steps under 'Report' stage	Entity	Entity	Adaa	-	
		Quality Assurance checklist validation on 'Report' steps	Adaa	Adaa	-	Entity	
		Publish Reports	Adaa	Adaa/ Entity	-	Relevant Stakeholders	

Official Measurement – Entity Level Maturity Assessment High-level Framework

Adaa
The National Center for Performance Measurement

Entity Maturity Assessment Dimension



Maturity Level	Score
Stage 1: **Low Maturity**	<2
Stage 2: Medium Maturity	**2-3.5**
Stage 3: **High Maturity**	>3.5

Types of Support from Government Entities

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The National Center for Performance Measurement

Key types of support required from Government Entities to implement the BEX Methodology

Service Data

List of all services and their classifications (core, support), the volume of transactions per service, the channels provided for each service, the user segments for each service, amongst others

Service Center Data

Locations of the centers, services provided in these centers, volume of transactions per center, beneficiary segments for each center, working hours, amongst others

Beneficiaries Data

Contact information for beneficiary segments required for BEX measurement, including their names, nationality, phone / mobile number, e-mail, amongst others

Permits

Issuing official permits to facilitate the task of researchers in conducting interviews with beneficiaries in the different service center locations, amongst others

Government Entities shall provide this data to Adaa within a period of **5 working days** from the date of request

Macro-Journey Level Measurement Outcome and Frequency

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The National Center for Performance Measurement

	Requirement	Report Outcome	Frequency	Trigger
Satisfaction Survey	Primary	• Overall satisfaction score • Drivers of satisfaction • Sub-drivers of satisfaction • Qualitative answers analysis	Every 12 months*	NSI to be measured annually, requiring the measurement of the journeys included in the index
Watani Application	Primary	• Overall satisfaction score • Drivers of satisfaction • Sub-drivers of satisfaction • Qualitative answers analysis	Continuously	Watani measures part of the beneficiary's journey
Mystery Shopping	Primary (for applicable journeys)	• General compliance score • Compliance drivers • Sub-compliance drivers • Qualitative answers analysis	Every 12 months*	If no operating data is collected to measure compliance, mystery shopping visits will be conducted to complete journey reports
Focus Groups	Secondary	• Key pain points • Improvement opportunities	Based on a need to deep-dive into particular macro-journey services, obtain additional comments and observations, or determine journey-specific sub-drivers of satisfaction	

* Measurement frequency is also subject to the seasonality factor (explained in the next pages)

Time and Seasonality Factors

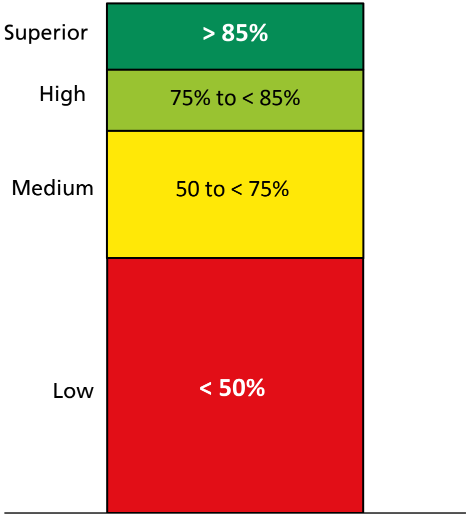
	Requirement	Report Outcome	Frequency	Trigger
Satisfaction Survey	Primary	• Overall satisfaction score • Drivers of satisfaction • Sub-drivers of satisfaction • Qualitative answers analysis	Ad-hoc	Entity level surveys will be conducted when a deep-dive into the entity is specifically requested for, beyond measurements included in the journeys
Watani Application	Primary	• Overall satisfaction score • Drivers of satisfaction • Sub-drivers of satisfaction • Qualitative answers analysis	Continuously	Watani acts as a complementary tool for the other VOB methods
Mystery Shopping	Primary	• General compliance score • Compliance drivers • Sub-compliance drivers • Qualitative answers analysis	Ad-hoc	Entity level visits will be conducted when a deep-dive into the entity is specifically requested for, beyond measurements included in the journeys
Focus Groups	Secondary	• Key pain points • Improvement opportunities	Based on a need to deep-dive into particular services, obtain additional comments and observations, or determine entity-specific sub-drivers of satisfaction	

Time and Seasonality Factors

	Seasonal	Non-Seasonal
Description	Macro journeys and Entities which have a seasonality factor, where service delivery dynamics are disrupted with specific factors (e.g. demand increase, climate change) that recur regularly and predictably every calendar year	Macro journeys and Entities which do not have a seasonality factor, where service delivery dynamics are not impacted with any time-related factors (e.g. fixed demand throughout the year, climate change has no impact on service delivery)
General Guidelines	• Measurement shall take place during the specified measurement cycle according to Adaa BEX Operational Plan • Surveys (i.e. face-to-face interviews) and Mystery Shopper visits shall be conducted during at least one working week, where all week days are measured • Measurement shall be conducted during different times throughout the day to cover all times (i.e. morning, afternoon, evening) • Measurement should avoid the periods of unforeseeable circumstances which are out of the entity's control (i.e. force majeure) during which service delivery gets disrupted	
Specific Guidelines	N/A	• If the time variance between the identified seasonality peaks and troughs is equal to or less than 6 months, spread the measurement between the two periods and develop 1 beneficiary experience report • If the time variance is more than 6 months, conduct measurement during the blocks of 6 months, and develop beneficiary experience reports for each 6 months block

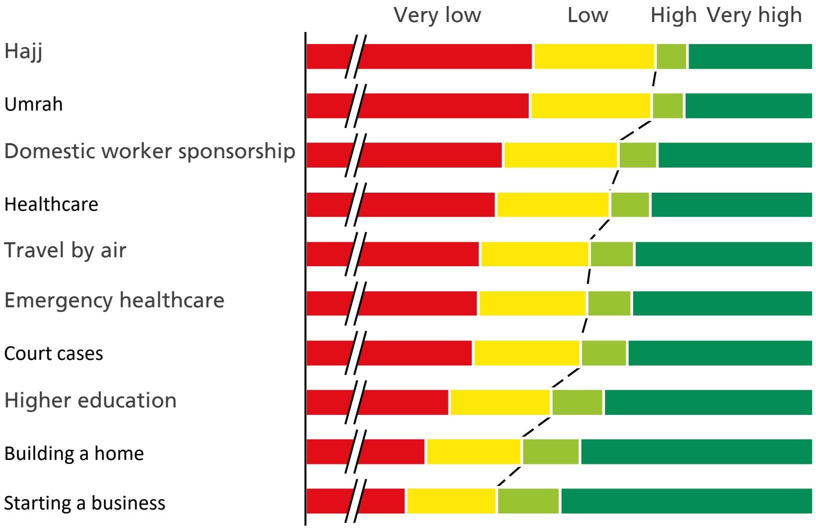
Target BEX Scores – Scale options

Fixed Compliance Scoring Levels



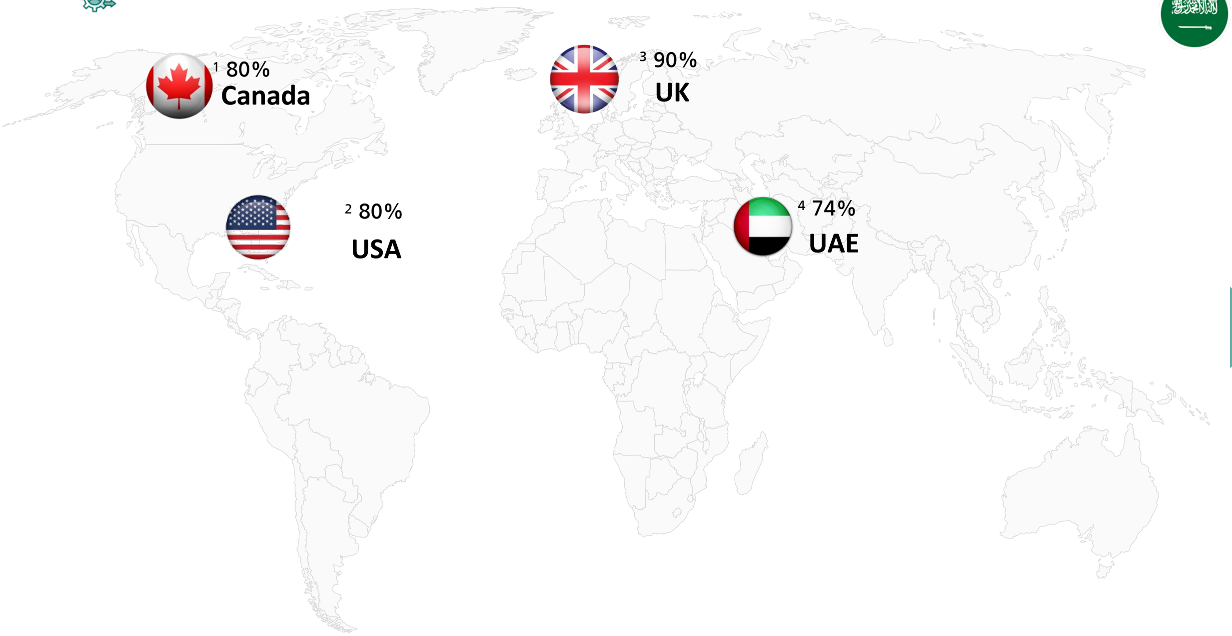
Short-mid term solution, based on benchmarked international targets for overall satisfaction

Journey adjustable Scale



Long term solution, based on historical journey satisfaction and benchmarked international satisfaction for different sectors (pending the development of a 3-point historical base to compare against)

Target BEX Scores – Fixed scale benchmark Study



KSA Beneficiary Satisfaction / Compliance Scoring Levels

Superior	> 85%
High	75% to < 85%
Medium	50 to < 75%
Low	< 50%

Sources:

[1] A Framework for Service Improvement in the Government of Canada, 2014

[2] U.S. Customer Satisfaction, Statista, 2017

[3] GOV.UK, 2017-18

[4] UAE Prime Minister Office, 2015

Target Adaa Fixed BEX Scores

Entity BEX Score Levels of Last Measurement	Annual % Target Improvement in Beneficiary Satisfaction / Service Compliance Score*
More than 85% Superior	Maintain score and strive for continuous improvement
75% to less than 85% High	Average target increase of 2% per year
50% to less than 75% Medium	Average target increase of 4% per year
Lower than 50% Low	Average target increase of 8% per year

Remarks

The target % increase is an estimated average increase based on leading practices regionally and globally.

This target % highlighted in the graph may range (+) or (-) based on factors such as:

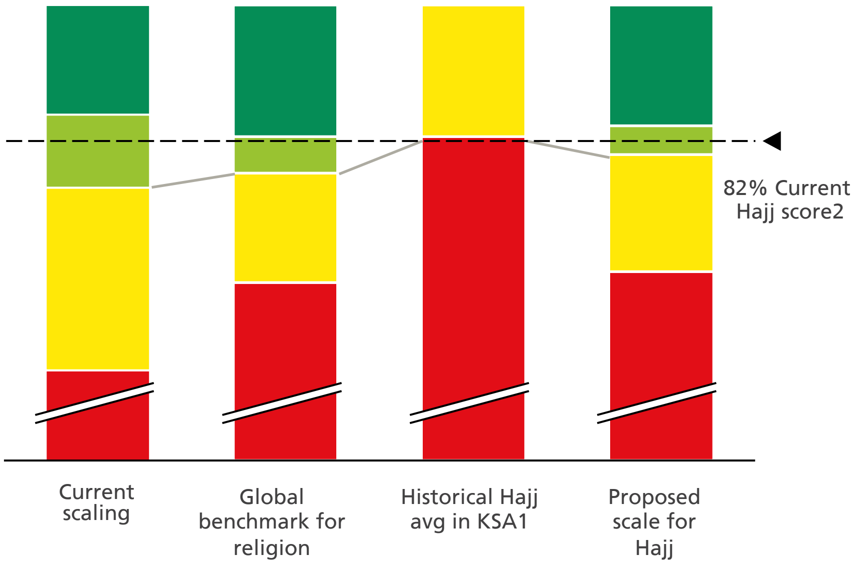
- Average service completion time
- Volume of transactions for the service
- Number of service centers around the kingdom

Entities shall not remain in the same score level (medium or low) for more than 3 years. In the event that this occurs, the reasons are assessed and the annual BEX score target is revised for the related entity.

*The target scoring levels were based on an analysis of historical customer satisfaction scores for reports published by USA, UK, and Canada
*Targets highlight the absolute percentage increase in the overall satisfaction or compliance score

Target Adaa Journey adjusted BEX Scores

Comparison of scale options for Hajj journey



Proposed approach

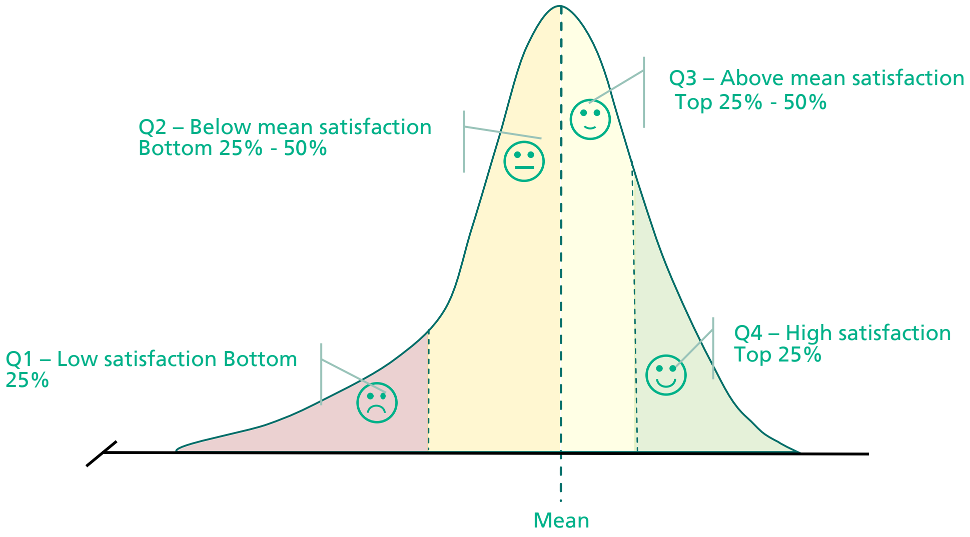
Mid-point between low and high tiers at the average:

- **Global mean** for the sector: to assess potential of the sector
- **KSA historical scores** for the journey: to ensure relevance for the region and specific journey

To be developed once 3 historical data points have been collected per journey for KSA.

Adaptive scale based on global benchmarks

Distribution of global satisfaction scores in health sector



Challenges and benefits of global benchmarks

Variable relevancy of benchmark countries to countries with unique conditions (e.g. KSA)

Government department level satisfaction scores rather than journey level scores

Set **realistic targets** for entities where beneficiaries are harder to satisfy

Encourage **continuous** improvement for entities wrongly placed in a higher tier

Adaptive scale based on historical trend

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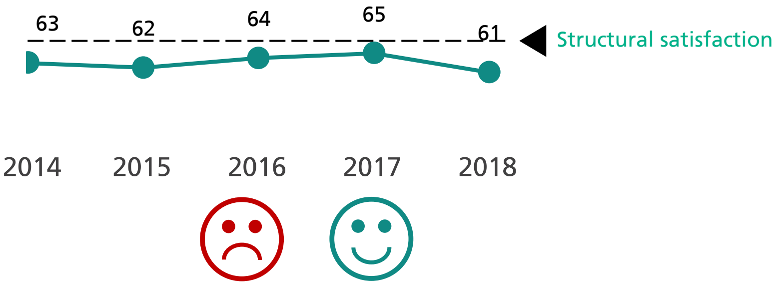
The National Center for Performance Measurement

Historical trend of a journey

Illustrative



Challenges and benefits of the approach

- **Limited historical data / reference points** makes the approach unusable
- **Reduced ambition to improve** underperforming journeys/entities

- **Fair comparison** of journeys/entities with differing current satisfaction scores
- **Most relevant reference** point for a country with unique characteristics such as KSA

BEX Reporting Levels

Reporting level	Description	Scope
Central Government	Detailed reports including an executive summary and a section outlining the satisfaction and service compliance scores for each of the measured services, drivers and beneficiary segments	All measured macro journeys and entities
Province Governors	Detailed reports tailored to every province including an executive summary and a section outlining the satisfaction and service compliance scores for each of the measured services, drivers and beneficiary segments	All measured services and service centers belonging to the province
Government Entities	Detailed reports tailored to every government entity including an executive summary and a section outlining the satisfaction and service compliance scores for each of the measured services, drivers and beneficiary segments	All measured services and channels belonging to the government entity
Service Centers Management	Detailed reports tailored to every service center outlining the satisfaction and service compliance scores for each of the measured services, drivers and beneficiary segments	All measured services belonging to the service center
General Public	Infographics including high-level, one-dimensional scores such as services, drivers, and beneficiary segments, excluding detailed or multi-dimensional results	Macro journeys and entities to be selected by Adaa

Adaa

The National Center for
Performance Measurement