# esd-toolkit Profiling Features

From the start of October 2007 esd-toolkit provides online software, data and guidance to help you understand who the residents of your area are and the profile of customers for each local authority service.

Understanding your area

esd-toolkit has:

• Maps showing the predominant profile group and profile type of residents for each ward within your local authority area ☀

• Reports and downloads of the number of households of each profile type in each ward of your authority ☀

• Charts and reports allowing you to compare the profiles of your residents against those of other authorities nationally or for a selected region and/or authority type ☀
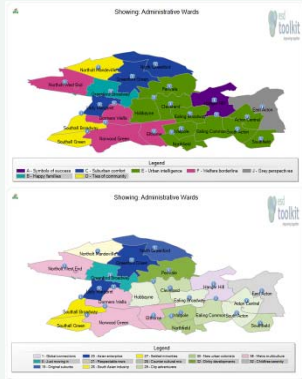
• Descriptions of each profile type with data on these characteristics: ☀

- Income band
- IMD ranking
- 6 different measures of health
- Propensity to use different access channels
- Responsiveness to different marketing channels

• Drill-down maps, reports and downloads of resident profiles for multiple levels of output area and post code where the data has been uploaded to esd-toolkit for your authority ✚
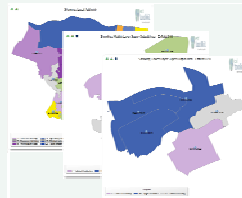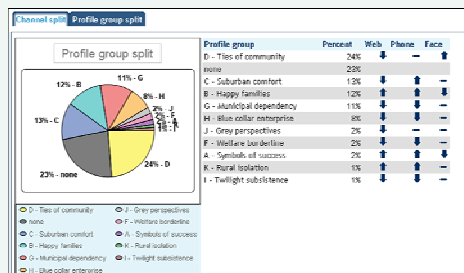
Understanding your customers

Online functions for:

• Upload of service transaction data (eg from your CRM system) for automated profiling based on postcode or household ✚

• Upload of service transaction data already profiled

• Charts, reports and downloads to allow you to see the split of customers for each service or for groups of services by profile type or group

• Month by month breakdowns of service volumes split by profile type to identify trends

• Comparison of your service profiles with those of groups of other authorities

• Documented methodology on customer profiling

Published 11 November 2008. All information is accurate to the best of our knowledge.

Informing channel shift

• Breakdown of service take-up by channel
• Reports and charts to show by profile which customers use which access channel
• Channel characteristics information to identify the propensity of each profile group to use each major channel and the best marketing methods to encourage channel shift

Service costing

• Simple means of recording service transaction costs by channel
• Cost calculator to show service delivery costs and perform 'what ifs' to inform a channel strategy for each service
• Documented methodology on 'top down' service costing
• Assistance with data cleansing and uploading

Building a picture of your authority

All the profiling features fit into the esd-toolkit model with which you may already be familiar for its performance management and service improvement features. If not, contact the esd-toolkit team for help making the most of esd-toolkit by localising it to reflect how your authority runs.

Profiling functions make use of esd-toolkit's standard lists of services, interactions and channels, to allow comparison between authorities. esd-toolkit and esd-suppliers members with expertise in these standards can provide help adopting them.

For up-to-date information and links to online functions see www.esd.org.uk/profiling or e-mail support@esd.org.uk.

Key

☀ Data made available by Experian Limited and pre-loaded for use **freely** by all subscribed authorities

▭ Documentation and guidance made available to all subscribed authorities

✚ Function that requires address profiling data owned by your local authority or licensed from a provider such as Experian

Profiling software is developed with the support of CLG and available to all subscribed authorities.

Customer Profiling Project

From April 2007 to date, 21 local authorities have come together to work on Phases I and II of esd-toolkit's Customer Profiling Project (CPP). The momentum is picking up and a further 12 are already signed up PIII with the opportunity for more to join until 31 March 2009.
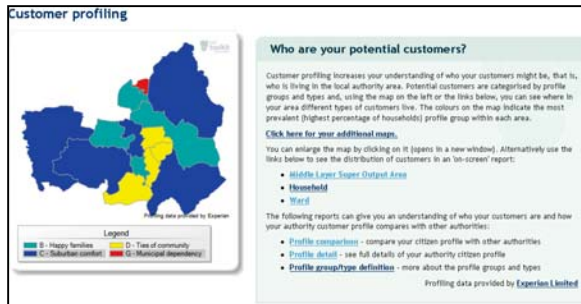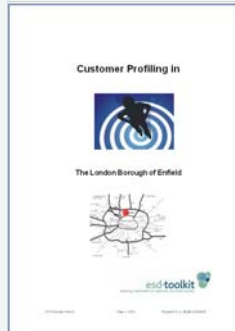
The pioneering work of these authorities and the backing of the department of Communities and Local Government resulted in a set of resources and methodologies that make possible practical profiling by each local authority of its citizens.

Authorities have so far profiled 5.5 million service transactions, in a uniform format using national standards for service (LGSL), Interaction (LGIL) and Channel (LGChL). Each authority's service information was analysed to improve an understanding of customers, inform channel strategies and indicate the cost implications of channel shift. Authorities are now able to benchmark with demographic near neighbours and put performance into context. As a spin-off from the project every authority subscribed to esd-toolkit gets ward level data software and guidance. Detailed analysis requires licensed data

Outputs

CPP provided:

- A profiling report specific to an authority analysing the authority's citizen profile and the profiles of customers for each service in comparison with other councils
- Detailed address profile data licensed from Experian Limited
- Software built into esd-toolkit to analyse customer profiles by geographical area, service and channel
- Software to gather service and cost data for assigning service profiles and costing by channel
- Documented methodologies on customer profiling and service costing

Supplier contributions

Key to the success of the project has been the contributions of esd-suppliers members.

- **Experian Limited** along with a great deal of practical help provided ward level data, free of licensing costs, for use by all authorities subscribing to esd-toolkit.
- **Cintra**'s Searchlight product provided automated or semi-automated assignment of LGSL service references, making consistent referencing of service transaction records possible
- **Jacqui McNish** (Aston Campbell Associates) who conceived the project and provided data analysis services

Contributions have also come from **27Consulting**, and CRM vendors and integrators.

Phase III

esd-toolkit is running Phase III of the project from October 2008 to March 2009. Phase III allows to profile their customers and services, by choosing items from a "Pick n Mix" programme that supports them through the process. All PI & PII participants are encouraged to remain involved to share their experiences and benefit from new Phase III outputs and benchmarking.

Contact Sheila Apicella at Shelia.Apicella@esd.org.uk if you are interested in participating in Phase III.

PI & PII participants

PI & PII resulted from collaboration between these authorities:

- Birmingham MBC
- Chorley Borough Council
- East Northamptonshire Council
- Lancashire County Council
- London Borough of Enfield
- London Borough of Havering
- London Borough of Lewisham
- London Borough of Redbridge
- London Borough of Waltham Forest
- Luton Borough Council
- Mendip District Council
- North East Derbyshire District Council
- Wokingham Borough Council
- Dudley Metropolitan Borough Council
- Kettering Borough Council
- Nottingham County Council
- Nuneaton & Bedworth Council
- Rossendale Borough Council
- Stevenage Borough Council
- Tameside Metropolitan Borough Council
- Wear Valley District Council

with esd-toolkit and CLG. The project consulted the Cabinet Office to align with its Customer Service Standard and Customer Insight, the IDeA and the Customer Satisfaction Project, the Local eGovernment Standards Body and the Audit Commission.

Get involved

Phase III pick n mix allows you to put together a package that suits your needs by choosing from a set of support resources or designing a tailor made working programme. Already signed up include: Birmingham MBC, Calderdale Council, Durham Unitary, Fenland District Council, Greater Manchester Association, Norfolk City Council, Plymouth City Council, Reading Borough Council, Rugby Borough Council, South Lakeland District Council, Suffolk Coastal District Council, Three Rivers District Council, West Somerset Council. There are many advantages to being part of an esd-toolkit customer profiling project such as the ability to benchmark, link profiling work with the National Indicators and a 10% discount on the cost of an Experian Licence.