

Best-in-class private sector organisations:

- use research as part of their key metrics and are still working towards fully integrated customer metrics. This challenge continues to increase as data sources become more varied and complex
- use insight to inspire and drive internal change. This needs to be strongly supported from the top down, and adequately funded and resourced to provide breadth and depth
- believe that customer value drives competitive advantage and recognises the importance of customer value. The issue of fair exchange of value is a concept that is just starting to take hold with most businesses.

N/A	Pre -Entry	Entry	Advanced	Leading Edge
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Champions the customer

Does not do this at all.	Commissions ad hoc research and analysis on customers. Simple reporting and research on a regular basis.	Commissions basic reporting and research around customers on a regular basis.	Develops a structured programme of research and analysis centred on better customer understanding.	Proactively uses evidence to personalise the customer to the organisation. Staying close to customers is a philosophy. Moves from reporting to engaging/ listening.
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Uses insight to drive decision making

Does not do this at all.	Initiates bespoke projects to answer specific business questions.	Develops basic reporting suites supplemented with ad hoc studies. Limited influence or actionability.	Develops a structured programme of research, analysis and data collection centred on stakeholder requirements. Uses insight to aid decision making in some key areas.	Ensures research/ analysis/ data is fit for purpose and connected to the business goals and objectives. Develops insight which is directive and helps prioritise action. Communicates and imbeds insights effectively through business strategy and tactics.
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Gets the why as well as the what

Does not do this at all.	Understands the questions the business wants to answer. Reports results to project owner and ensures that findings are accurate.	Starts to align the research/ analysis and business questions. Reports results to key stakeholders and directs.	Ensures clear articulation of business requirements and research/ analysis priorities and methods. Articulates insight narrative to key stakeholders. Builds credibility as a valued voice in the business linking insight to commercial goals. May develop business partner model.	Ensures choices are clearly explained in the business within the context of the commercial priorities of the business/ area of business. Articulates insight narrative through the business. Builds credibility as a valued voice in the business linking research to commercial goals. Has clearly defined relationships with key business partners.
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Believes that customer value drives competitive advantage

Does not do this at all.	Knows that understanding customer value is important and may commission bespoke projects to better understand.	Knows that understanding customer value is important and is developing programmes to collect and report data. Understands that customers are central to value creation for the business.	Understands that customer value is at the heart of driving value to the business. Can articulate how better understanding customer value equation can contribute to driving commercial success and prioritise research/ analysis/ data needs to help achieve this. Is learning how to best communicate and action insights to	Understands that customer value is at the heart of driving value to the business. Has achieved a sense of tacit importance of 'customer' in most things that are done as a business fuelled by continuous customer insight feeds. Helps the organisation understand how to generate desired customer outcomes. Ensures there is a fair exchange of value between the business and
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generate desire
customer
outcomes.

its customers.

Balances what it wants and what it should do

Does not do this at all.	Measures customer impact and reports results on an ad hoc basis with limited influence on decision making.	Measures customer impact and reports results on a continuous basis with limited influence on decision making.	Influences organisation to ensure that customer impact is part of decision making process. Identifies unnecessary processes that are internally driven and don't help deliver customer value. Has developed initial customer feedback loop to ensure there is clear understanding of the business activities on customers.	Influences the organisation to ensure that customer impact is part of the decision making process. Helps balance organisational output and customer outcomes. Identifies unnecessary processes that are internally driven and don't help deliver customer value. Suggests proactively new initiative/ areas for exploitation from customer / commercial knowledge which can drive product/ proposition opportunities/ areas of potential commercial advantage.
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Builds partnerships with suppliers

Does not do this at all.	Ad Hoc projects, individually contracted. Limited desire or planning to develop long term relationships.	Some retained agencies supplying regular reporting. Limited integration and collaboration.	Portfolio of suppliers. Programme of activity. Procurement involved with large contracts. Some agency interworking.	Strategic relationships developed with key agencies. Procurement actively engaged in portfolio development and maintenance.
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Fully integrated, holistic programme.

Uses insight to inspire and drive internal change

Does not do this at all.	Individual reports held locally. Limited dissemination and influence. Limited systemic understanding of availability of knowledge across the business. Limited sharing.	Individual projects debriefed to key stakeholder groups with some recommendation and debate. Initial cataloguing of work done and work planned but no collective availability or planning.	Starts to build narrative from several data/information sources. Engages organisation at multiple levels, creating debate and some action. Good availability and access to information across the organisation and signposting to potential users.	Builds engaging communication strategies to communicate insight across all levels. Generates a narrative from insight that can be understood and used by different audiences that need to use it. Brings research to life at operational levels and makes all research and knowledge accessible, including systems to retain tacit corporate knowledge.
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Uses research as part of its key metrics

Does not do this at all.	Research is not a part of key metrics. Metrics are largely internally driven and not customer generated.	Uses research metrics in isolation. Limited cross business alignment of measures and metrics.	Uses research to balance operational measures with measures of customer value, Brand and performance. Good alignment of measures and metrics to enable cross business comparisons, as well as a competitive understanding / benchmark.	Uses research to balance operational measures with measures of customer value, Brand and performance. Creates measures that drive desired corporate behaviours. Balances short term measures with forward looking insight to
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drive organisational decision making. Excellent alignment of all measures and integrated use of customer and transactional measures. Developed sense of predictive as well as rear-view mirror measures of customer performance.

Focuses on the questions data needs to answer

Does not do this at all.	Responds to stakeholder brief. Limited interpretation of requirement or context provided.	Responds to stakeholder brief. Seeks to clarify business objectives and benefit. Draws on any previous knowledge to provide context.	Identifies the key purpose for new data collection/ knowledge generation. Ensures the right questions are asked. Makes clear reference to existing data sources available and directs new knowledge creation into clearly new territory	Identifies the key purpose for new data collection/ knowledge generation. Ensures the right questions are asked and that research connects to commercial outcomes. Understands what data can and cannot do. Connects various pieces of work to provide a good connection to work across the organisation and how it connects to broader commercial goals
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Level of specialism in team

Does not do this at all.	General market research/ analysis professionals or	Team members have general skills, limited specialist	Clearly defined roles related to area of specialism, with	Team consists of specialists , plus non specialist management
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marketing manager.	knowledge.	in-depth skills.	roles.
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Team structure, resources

Does not do this at all.	Individuals, or small team embedded, in marketing, or lines of business. Low profile.	Individuals, or small team embedded, in marketing, or lines of business. Low profile. Strong stakeholder support for numbers/ dashboards.	Established team, often in marketing, liaising where relevant with other functions.	Stand alone team with senior reporting line, working closely with other functions.
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Internal perception

Does not do this at all.	Part of the functional team, accessed as required.	Specialists with limited influence on on-going decision making.	Active in leading discussions with budget holders, recognised as key influences within the business. Influence stakeholders at a project or programme level.	Recognized as experts and independent trusted business partners who represent the voice of the customer and drives insight into the decision making engines of the business.
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