

Development of a Statistical CRM

Jose Jabier Zurikarai (EUSTAT – Basque Statistics Office)

jjzurikarai@eustat.eus

Abstract

Statistical agencies have many different contacts with users. Almost every organization has different user profiles and relationships. We have many anonymous users that cannot be asked about their feelings but we also have identified ones. The number of those anonymous seems to increase according to our web site traffic data. But we don't handle in an effective way those relationships we have with identified users.

The built-up of a CRM could bring us the chance to increase the number of identified users and it also to get some feedback from them. It's not just about satisfaction surveys. We must be ambitious and try to take advantage of the situation. But then we should work in an organized way. So, the idea of CRM means an integrated system that will become the tool to help us working in this way.

We have already several elements that should be part of the CRM and we will start developing the schema.

1. PIN. It is the application to manage the Information Service. Both fast-answer information requests (free) and customized statistical information requests (payable) are registered with information about the user, the request and the answer.
2. ESU. User satisfaction survey. Every two years
3. Complaints and Suggestions. There's a form in the web for these purposes
4. Newsletter subscribers
5. Press releases subscribers
6. Lurdata Registered Users. Lurdata is a GIS based web-application to access statistical data. Some functionalities require registration.
7. International Statistical Seminar. Every year we organize a seminar and we handle registration.
8. Summer university course. It takes place every two years.
9. University presentations. We go to some universities, to the classroom and teach them about the use of our data.

All those services are not really connected. So the CRM would be a system that links the services. We believe that a linked system will give us some advantages. We will know better our users, we will be able to offer them new services and in the end it will lead us to have a better interaction with them. As a result we will be in a better position to gather the information we are looking for: how they perceive us and what do they think about our products and services.

Those different parts are already linked in some situations. For instance, we use information requests for the user satisfaction survey. But we don't give the option to those people to become subscribers in a direct way.

With the CRM we will give a better service to the users, that's the first point. Besides it will give us valuable information. But how are we going to do that? It's not that clear, but we have some ideas and we have planned this job. Therefore the aim of the presentation will be to share our findings with this, which is a project in its early days.

Statistical CRM

Jose Jabier Zurikarai

Introduction

EUSTAT is currently designing the construction of a Statistical CRM. The idea comes from the various discussion panels that took place in the elaboration of the Marketing and Dissemination Plan.

This plan is one to develop the goals that were set in the Strategic Plan not long time ago.

In this paper we will start from the context where this project is taking place and then we will mention the current elements that will be part of the CRM, together with some necessary new ones. Finally we will try to explain their connections and how they will be integrated in the final system.

1.-CONTEXT

Eustat has its strategic plan and it drives clearly the activities of the Marketing and Dissemination Department.

A brief overlook of the plan show us the Mission and Vision of EUSTAT

MISSION

Eustat is the autonomous body of the Basque Country that develops, produces and distributes quality, objective and scientifically verified official statistical information for the Basque public administrations, social agents and society. Furthermore, it leads and coordinates the statistical activity of the Basque Country and cooperates within the Spanish and international sphere of statistics.

The Vision sets the goal that Eustat needs to move towards in the long term based on the strategies, policies and key results. It is the guide that allows us to select the current direction as well as future adjustments. It is also the basic criterion for the ongoing evaluation of the progress made throughout the strategic cycle.

VISION

Eustat's goal:

- To reinforce its **leadership** in the **provision** of statistical **information oriented** at the statistical **needs** of its **users** with high levels of satisfaction
- To be an excellent and innovative body in the production and dissemination of statistics and in the methods it uses
- To be an accessible, reliable, professional, independent and socially responsible organisation
- To ensure its professionals feel part of the organisation, and to raise their level of satisfaction as well

To improve collaboration between the respondents, primarily with institutional respondents, in order to guarantee the quality of statistical operations

Values are defined as the principles or philosophies that will guide the internal conduct of the organisation and its external relations. They set expectations when faced with dilemmas, and they set out what is desirable and what is not. They must have a direct effect on the conduct of members of the organisation.

VALUES

- Professional independence
- Technical accuracy

- Confidentiality
- Ethics and integrity
- Commitment to quality
- Client orientation**
- Teamwork
- Continuous improvement
- Development of people
- Transparency of results
- Social responsibility

Following the strategic plan and linked to it we have the Marketing and Dissemination plan. We set 11 improvement areas, being one of the “Better knowledge of the users”. The structure of that plan defines the following:

CHALLENGE □ Know key users and work closely with them to identify their needs and give better answer to them

GOAL □ Set systematic relationships with key user segments to promote initiatives that give value to the users

ACTION □ Model for the relationship management with key users: CRM

With both plans we are somehow moving towards a user oriented organization. Quality issues and being capable of producing relevant and robust statistics is a must. But, is it enough? No, unless we ensure that all those data we produce are really being used and satisfy our user needs.

2.-PURPOSES

The context gives us a general idea of the reasons behind this project and we could say that it is within our organizational framework. But if we want to specify what the CRM will be in terms of a real tool we must set the purposes we have.

There are two sides: internal and external. In other words, organization and users. Let's find the aims and desires of both sides and this way we can guess which of the current elements are valid and which ones should be added.

2.1.- Internal. Organization

There could be lots of questions to be answered in order to specify the purposes. Some of them are clear enough.

What do we need from our users? Which are the improving areas as statistical information providers?

- Increase **feedback** from users
 - **Improve** services
 - **Efficiency** of the marketing service
 - **Evaluation** of statistics
- Increase **feedback** from users

Users take statistical information for their needs. When they use statistics we don't have any feedback about that. If we manage to set some basic relationship with the users that are into the CRM system, then we will be able to increase the feedback. We already have some feedback but we get it from some "heavy" users and maybe they don't represent accurately the whole picture. So the increase of feedback is aimed to make it unbiased.

- **Improve** services

Statistical organizations are committed with usability of their product and services. It means that somehow we recognize that the use of statistics is not that easy. Therefore, there's often a will for the improvement. It's quite obvious that a higher level of relationship with the users will lead us to focus better any improvement. There's a risk of producing statistics or services regardless of the real needs of the users. Once we release the output, we wait for its success. It would be better that prior to any improvement we have a better knowledge of the way the users deal with statistics.

- **Efficiency** of the marketing service

Not everything is interesting for everyone. As the subject areas we have are spreaded, the profile of the users is more diverse and varying. The CRM will let us know better what the interests of users are. Then we can inform them only about those subject areas they use

commonly. We will be able to customize the marketing activities according to what they have been using.

- **Evaluation** of statistics

Many statistical offices are worried about how to evaluate their work. Internal evaluation is more and more common and gives interesting results. In EUSTAT there's a system and an application called "Ebalua" that checks the whole statistical process. But when it comes to the user's side, the lack of information is a problem. Indeed, there's no reason why the users can identify the data they are interested in with the statistical operation it comes from. The CRM will "force" the users to identify the data and the source. If they use the number of students, is the source the population census or the education statistics? Do they tell apart the employment figures from the national accounts with the working population from the labour force survey. Many of the don't care about that but if they have to choose the sources to have only those data they are interested in, then maybe they can evaluate better that source.

2.2.- External. Users

Whatever the CRM will be it must be useful. It will work only if the users have the feeling that it's worth registering in it. Useless features and unnecessary complexity can move away people, and the services that are into the CRM must have always this characteristic: they can only be provided if registered. We have identified the following qualities.

- Easier **access** to products and services
- Better **understanding** of the statistical activity
- Higher level of statistical **literacy**
- To **feel** they are in the best possible website. **Experience**

- **Easier access** to products and services

Once we "recognize" that handling ourselves in any website of statistical offices is not easy, sometimes complex and even confusing, there's no need to say that CRM must be equal to EASE. One of the elements of the CRM will be that users can build-up a selection of statistics they use. In this case, whenever they enter into the system, that selection will show them the statistics they have previously chosen, with the type of product (tables, databank, press releases.....) and always with the last version and an announcement of any update. The same architecture of the CRM will organize the elements in a way that they can be accessed and used directly. And those elements will be optional, so only the desired services are activated.

- **Better understanding** of the statistical activity

Official statistics are one of the many information sources that can be used in the daily activity of our users. There are some features that make official statistics unique or different. Is that something clear for the users? The way data are produced is a key point to take advantage of using it. With the CRM it will be possible to understand better what we do. Why we do have plans that are approved in the parliament, why the statistics have their periodicity: monthly, quarterly, yearly..... What are the conditions to produce tailored statistics and how affects the limits of confidentiality. Once the user decides to join the CRM he will be something else that a simple user and that will make them more efficient, just because they know us better.

- Higher level of statistical **literacy**

This is far more precise than the previous point. Let's talk about learning/training. With the spreaded subject areas of statistics, it is almost impossible to be an expert in all the fields. Even the more expert user will have some shortage of knowledge in certain subjects. And of course, there are those with a "low" level that will appreciate any help we can give them. We have a couple of positive experiences, two on-line training courses. One was "Learning to understand economic statistics" and the other, recent one, "The statistical information, characteristics, seeking methods and use for public bodies". The first one sits on the subject-matter side and explains basic concepts for GDP, CPI and other indexes. The second one has the aim to teach the users to be more efficient when they use our information. Both were launched in moodle platforms: the first one was opened to the public and the second one for public administration workers. Those platforms were external to us, but we could have our own one. Moodle is a well-known on-line learning platform and it gives lot's of choices to deal with this.

- To **feel** they are in the best possible website. **Experience**

When it comes to subjective perception there's no doubt that positive feelings reinforce the user's satisfaction. Any product or service we consume has a final step where we asses our overall experience. Positive feelings in this final step mean that we are very likely to repeat the experience. This situation can be the same with statistic users. It was not long time ago that we were living in a world with almost no competitors. But things are never the same. With the timeline pressure and users wanting the very last data, (many times, regardless of its real accuracy) others can produce non-official statistics. Maybe Big-Data is sort of a hype, but big companies have so many data that they could become our competitors. In this likely scenario we can't predict our own changes. We don't know wether we are going to change the way we work, but we can assume that users will have more sources of data to choose from. With the CRM we should be able to work with the subjective aspects of the user experience and if they feel they are in the best possible place to be, all this effort will be worth it.

3.-ELEMENTS

Before we start to build anything there are some elements that already exist and will be part of the CRM. The starting point are those elements and then the necessary new ones are to be added.

As a global idea we consider that most of those services require the users to be REGISTERED. Otherwise it's impossible to get it

The following are services we already have:

PIN. Information Service Management System. Petitioners are registered.

Newsletter. It works under subscription.

Lurdata. GIS system for access to data. Certain options only if registered

International Seminar. Annual event with international level experts

Summer course. Biennial in the Basque university.

Statistical Plan. The Basque parliament approves the Statistical plan. Before sending the plan to the parliament it has a first step where users and producers meet to discuss about the contents of the plan.

Press releases. Most media in the Basque Country are subscribers of our press releases.

User satisfaction survey. A classic in the quality frameworks.

School Web. It is a web site for the high-school level learning. Now moving towards an interactive site where registered teachers can produce and share activities.

University teachers. During the last years we go to the university to show or teach them how to use our data. First they were presentations and they've become classes.

Those are the new ones

MyEustat. It will be the entry point to all the services, the result of the unification

Saved Queries. The Data Bank has the option to save queries. It gives an url that the user has to store somewhere. The CRM will provide a place for that

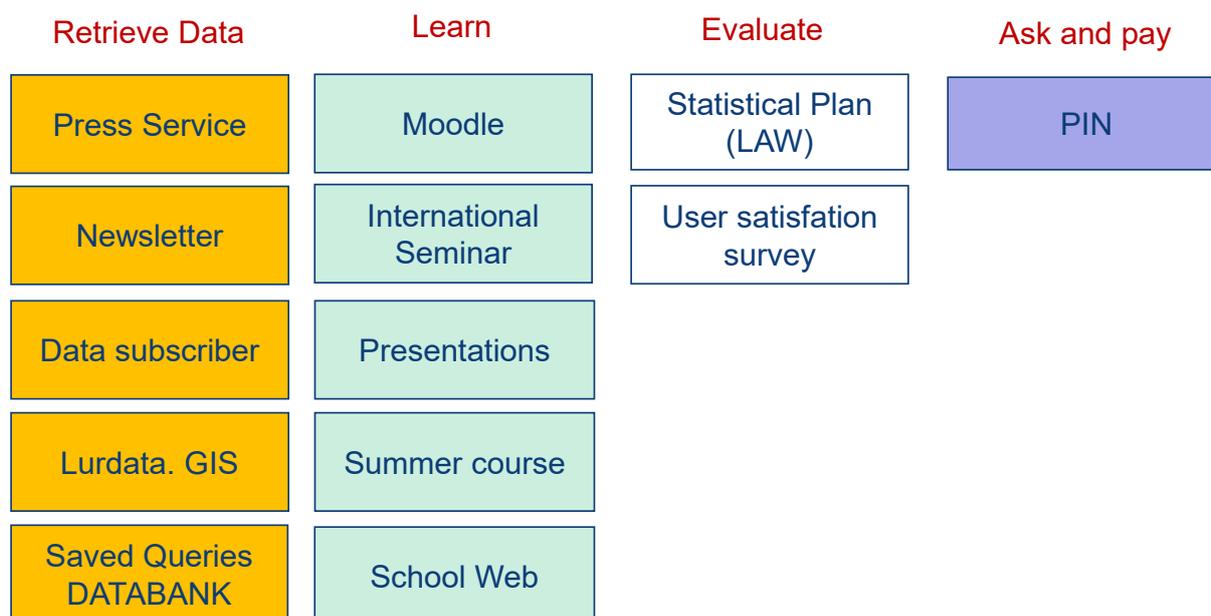
Moodle. As it was mentioned before, learning can be done with this platform in a efficient way

Data subscriber. A option for the users to choose the statistics they are interested in, with the press releases, last updates or last visited tables for instance.

5.- System Architecture

All the elements will be part of the CRM so far. They will be organized and their interactions have to be designed. There is a heterogeneity and the first step is necessarily the reduction of it. They will be grouped first. Then the feasibility of the interactions has to be studied. And then we will build it up.

This is the first approach to the architecture with four groups of elements.



a.- Retrieve Data

The elements included in this group are those aimed to access statistical information. From the Data Bank queries to the press releases, users can customize the way they access to data and choose the subject areas they are interested in.

b.- Learn

In this group the resources are focused in the improvement of user's skills and ability to use and understand data

c.- Evaluate

Here we have the feedback. Nowadays User Satisfaction Survey is conducted every two years. But if we have it in the CRM, it could gather more information. Besides it make sense that when we ask the users to answer the survey, we show them the last survey they filled. We can give them their "profile", compare with the overall profile and ask them if they keep their last scores.

Evaluation is not only about what we use, it is also about the needs that were not satisfied. When we look for people to take part in the groups for the statistical planning, we tend to invite the closer users. May be we bias the participation in the groups. With the CRM we can expand and look for a wider variety of users.

d.- Ask and pay

Our information service will be almost the same. There are free requests and paying ones but we register all or them. It already registers the users and it has a lot of information about them. It should be the core of the registration system. It produces some reports about the requests. If we expand the features of the CRM this core registering system will have to be developed and give us more information about the users. What are their subject areas of interest, which type of statistical product they prefer, the frequency of use and so on.