Rwanda National Customer Satisfaction Survey: Results and conclusions

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Rwanda National Customer Satisfaction Survey

Results & conclusions

Presented to

Nation Customer Care Steering Committee

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Deputy CEO RDB in Partnership with
On The Frontier
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A first, this survey serves as a baseline and offers actionable improvements.
- Absence of a baseline hinders ability to track progress over the past years.
- 522 customers surveyed in Kigali, Musanze, and Huye across 7 sectors in Jan 2010.
- Survey tracked expectations and experience across 5 pillars of customer satisfaction.

Overall, respondents rated customer care well below expectations.
- Timeliness, problem solving and communication are the 3 main performance gaps.
- Despite expectations not being met, customers on average stated they were satisfied.
- Perception of value for money was low across sectors.

Service levels are uneven across customer segments and organizations.
- Rwandans with higher education and non-Rwandans reported better customer service.
- In the public sector, immigration ranked top while district offices were last in performance.
- For businesses, hotels received the highest rankings while banks received the lowest.

Ongoing customer care initiative could be reinforced.
- Specific problems highlighted must be addressed holistically rather than one by one.
- Organizations will only improve customer service sustainably by establishing clear policies.
- On a national level, an institution is needed to drive customer service excellence.
To test the level of customer satisfaction with Rwandan organizations, a survey was administered to 522 customers in 7 sectors in 3 urban centers (Kigali, Huye, Musanze). Face to face interviews were conducted with customers on the organization’s premises.
Overall Satisfaction Level

Respondents indicated their satisfaction levels were average

On a scale of 1-7, how strongly do you disagree/agree with the statement “Organizations in Rwanda generally meet my customer service expectations”:

The majority of respondents (63%) noted their level of satisfaction as neutral. Those with more extreme opinions were almost equal in number.
**Overall Satisfaction Level**

Value for money is the top area of dissatisfaction

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<table>
<thead>
<tr>
<th>When engaging with a business, you feel that they...</th>
<th>Do not provide value for money</th>
<th>Provide value for money</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>3.50</strong></td>
<td></td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>When you leave a Rwandan organization, you feel...</th>
<th>Highly dissatisfied with the experience</th>
<th>Highly satisfied with the experience</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>4.27</strong></td>
<td></td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>You feel the general attitude of Rwandans to customers is...</th>
<th>Negative and unwelcoming</th>
<th>Positive and welcoming</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>4.31</strong></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>People working in Rwandan organizations are ...</th>
<th>Unfriendly</th>
<th>Friendly</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>4.64</strong></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>People working in Rwandan organizations are ...</th>
<th>Unskilled and untrained</th>
<th>Skilled and well trained</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>4.70</strong></td>
<td></td>
</tr>
</tbody>
</table>

Most customers rate their satisfaction slightly more positive than negative except regarding the question of value for money.
Five Pillars of Customer Satisfaction

The RCSS Survey assessed the five key drivers of customer satisfaction

**Pillar 1: Communication**
- Awareness of service provision standards
- Information provided is complete and accurate
- Service delivery time is communicated

**Pillar 2: Ease of doing business**
- Access to the organization is easy
- Information about products and services is easily accessible

**Pillar 3: Problem solving**
- Staff are competent
- Comments/suggestions are used to improve services
- Complaints are appropriately handled

**Pillar 4: Professionalism**
- Staff have an appropriate appearance
- Staff are friendly
- Customers are treated like valued customers

**Pillar 5: Timeliness**
- Questions are answered quickly
- Problems are addressed quickly
- Waiting time is acceptable
All attributes received negative ratings but problem solving skills and timeliness were perceived as among the worst customer care elements.
Pillar 1—Communication

Communication must be improved through standard practices, increased accuracy

Performance on communication

- Smallest underperformance
  - Immigration: -17%
  - Hotels: -19%
  - Telecoms: -26%
  - Water Utilities: -27%
  - RRAs: -28%
  - Banks: -31%
  - District: -33%

- Largest underperformance

  • Banks, telecommunication companies, and water utilities need to be more aware of service provision standards
  • Customers were most satisfied with accuracy at immigration services and water utilities, and least so at district offices and telecommunication companies
  • Customers at immigration services were very happy with the communication of service delivery time. Customers of banks and district offices were not
Pillar 2—Ease of Doing Business (EDB)
Customers generally satisfied with EDB, but there are areas of underperformance

- Smallest underperformance:
  - Immigration: -11%
  - Telecoms: -11%
  - Hotels: -13%
  - Banks: -15%
  - Water Utilities: -16%
  - RRAs: -21%
  - District: -30%

- Largest underperformance:
  - Hotels and district offices fared worst in terms of access to their organizations. These sectors should work to give customers additional means of contact, such as websites and customer help lines.
  - Immigration services fared best in terms of access.
  - Consumers also found service information very accessible at immigration services, but not as easily available at district offices and RRAs.
Pillar 3—Problem Solving

Problem solving skills are generally deficient amongst sector employees

Smallest underperformance

- Immigration: -17%
- Hotels: -22%
- Water Utilities: -26%
- Telecoms: -28%
- RRAs: -29%
- Banks: -31%
- District: -35%

Largest underperformance

- Immigration service staff were rated by customers as the most competent, and district offices the least
- Banks and district office employees do not sufficiently use comments and complaints to improve their services
- Customers of immigration services, hotels and water utilities are generally satisfied in the way their complaints are handled, while customers of the other sectors - particularly district offices - are not
Pillar 4—Professionalism

Customers are generally satisfied with professionalism, with a few specific concerns.

- In general, customers were satisfied by the appearance of sector employees.
- Customers were also on the whole satisfied with friendliness of employees, although district offices and RRAs fell behind the other sectors, but they have room for improvement in this area.
- Customers felt that they were treated as valued clients at hotels, immigration services, and water utilities. They felt that they were treated indifferently at district offices and RRAs.
Pillar 5—Timeliness

A lack of timeliness is a major impediment to client satisfaction

Performance on timeliness

Smallest underperformance

- Immigration: -13%
- Hotels: -20%
- Water Utilities: -22%
- Telecoms: -23%
- Banks: -27%
- RRAs: -31%
- District: -40%

Largest underperformance

- Immigration services and water utilities rated well in terms of answering questions quickly; district offices and RRAs ranked worst.
- Immigration services and hotels addressed problems quickly, while problems in this area were found in district offices, RRAs, and banks.
- Waiting time is seen as unacceptable at district offices.
Overall Comparison by sector

While immigration ranks top, districts get the worst ranking

**Better performers**
- Immigration: -14%
- Hotels: -17%
- Water Utility: -21%
- Telecoms: -22%
- Banks: -25%
- RRAs: -26%

**Worse performers**
- District: -33%

*Services related to tourism, such as immigration and hotels, performed closest to customer expectations while local government offices performed worst*
Customers in district offices, especially in Kigali, experienced the longest waiting times. Customers with a high level of education managed to wait the least.
Surprisingly, most respondents said they take action when they encounter bad customer service. However, nearly a quarter keep quiet and only 13% say they quit doing business with that company.
## Customer Satisfaction by Sector

### Key issues per sector

<table>
<thead>
<tr>
<th>Sector</th>
<th>Professionalism</th>
<th>Ease of doing business</th>
<th>Timeliness</th>
<th>Problem solving</th>
<th>Communication</th>
<th>Waiting time</th>
<th>Meeting customer expectation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Banks</strong></td>
<td>-15%</td>
<td>-18%</td>
<td>-27%</td>
<td>-31%</td>
<td>-31%</td>
<td>29 minutes</td>
<td>3.88</td>
</tr>
<tr>
<td><strong>Telecoms</strong></td>
<td>-11.2%</td>
<td>-16.8%</td>
<td>-22.8%</td>
<td>-25.9%</td>
<td>-27.7%</td>
<td>22 minutes</td>
<td>3.86</td>
</tr>
<tr>
<td><strong>Immigration</strong></td>
<td>-10.0%</td>
<td>-11.2%</td>
<td>-13.1%</td>
<td>-17.0%</td>
<td>-17.1%</td>
<td>64 minutes</td>
<td>5.00</td>
</tr>
<tr>
<td><strong>Districts Offices</strong></td>
<td>-24.5%</td>
<td>-30.0%</td>
<td>-33.0%</td>
<td>-35.1%</td>
<td>-40.0%</td>
<td>91 minutes</td>
<td>3.80</td>
</tr>
<tr>
<td><strong>RRA</strong></td>
<td>-17.9%</td>
<td>-21.0%</td>
<td>-28.3%</td>
<td>-28.8%</td>
<td>-31.3%</td>
<td>53 minutes</td>
<td>3.53</td>
</tr>
<tr>
<td><strong>Water utilities</strong></td>
<td>-13.0%</td>
<td>-15.7%</td>
<td>-21.5%</td>
<td>-26.2%</td>
<td>-26.7%</td>
<td>35 minutes</td>
<td>4.09</td>
</tr>
<tr>
<td><strong>Hotels</strong></td>
<td>-11.1%</td>
<td>-12.9%</td>
<td>-19.1%</td>
<td>-20.1%</td>
<td>-21.5%</td>
<td>15 minutes</td>
<td>4.13</td>
</tr>
</tbody>
</table>

All sectors in Rwanda have problems with timeliness, communication and problem solving.
Improving Customer Satisfaction in Rwanda

Specific problems identified must be addressed holistically rather than one-by-one.

*Customer service issues need to be addressed in a comprehensive manner with entrenched policies, processes and culture.*

- **Policies**
- **Product/Service**
  - Quality
  - Value
  - Brand
  - Availability
- **Premises**
  - Accessible
  - Usable
  - Serviced
- **Processes**
  - Defined
  - Communicated
  - Implemented
  - Measured
  - Refined
- **People**
  - Awareness
  - Technical skills
  - Teamwork
  - Behavioral skills

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- **Customer satisfaction**
  (The five star elements interact to ensure customers’ needs are met)

- **Performance measurement**
  (Review customer satisfaction and identify areas for improvement)
Improving Customer Satisfaction in Rwanda
Case Study: Department of Economic Development, Dubai

The Department of Economic Development of Dubai Government launched a turnaround program in 2007

**Situation Analysis**

- Experiencing long queues
- Dissatisfied employees and customers
- Increasing number of customer complaints
- Poor customer service due to employee attitude and a lack of understanding of customers’ needs.

**Actions Taken**

- Conducted mystery shopping to assess service levels
- Carried out a customer and employee satisfaction survey
- Provided customer awareness training on 5 star elements (policies, processes, product/service, people and premises) every day for 8 months
- Introduced 5 star promotional material serving as an aide memoire for employees and as motivational material for the customers
- Introduced a 5 star reward & recognition program using mystery shopping
- Created a dedicated reception area as a focal point for customers

**Results**

- Shorter queuing times
- Improved customer and employee satisfaction
- Improved awareness of customer needs by all employees
- Improved employee morale and motivation
- Enhanced business processes
Improving Customer Satisfaction in Rwanda - Institutions

Institutions can tackle these key issues using the following interventions:

**Cross-cutting issues:**
- Senior management commitment to excellence in customer service through clear policies
- Collection of data and customer feedback to inform policies

<table>
<thead>
<tr>
<th>Pillar 1</th>
<th>Communication</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Establish and publicize a “customer charter” to highlight the service to be expected including timeframe &amp; standards</td>
<td></td>
</tr>
<tr>
<td>• Available information is up-to-date, complete and accurate</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Pillar 2</th>
<th>Ease of doing business</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Increase options to access organization (e.g., internet/phone)</td>
<td></td>
</tr>
<tr>
<td>• Provide clear information on products and services available</td>
<td></td>
</tr>
<tr>
<td>• Identify one person as the customer service focal point</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Pillar 3</th>
<th>Problem solving</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Set clear procedures and maximum handling times for dealing with customer complaints</td>
<td></td>
</tr>
<tr>
<td>• Provide feedback to customers throughout the process</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Pillar 4</th>
<th>Professionalism</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Train staff in a very detailed manner regarding the level of service to be provided and in dealing with problems</td>
<td></td>
</tr>
<tr>
<td>• Provide incentives to reward staff for good customer service</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Pillar 5</th>
<th>Timeliness</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Set clear waiting time standards for each stage of service</td>
<td></td>
</tr>
<tr>
<td>• Train employees to focus on timely service delivery</td>
<td></td>
</tr>
</tbody>
</table>
# Improving Customer Satisfaction in Rwanda

## Case study of the Institute of Customer Service in the UK

### Mission

- Influence employers, policy-makers and opinion-formers on customer service
- Encourage and support the training of customer service professionals
- Set national customer service professional standards
- Establish evidence on the impact of customer service
- Recognize, reward and celebrate customer service excellence

### Activities

- **ServiceMark**: set out the national customer service standard
- **ServCheck**: self-assessment tool for organizations to assess performance
- **UKCSI**: a national Customer Satisfaction Index based on an annual survey
- **Customerfirst**: a leading magazine for customer service professionals
- **Professional Awards**: to promote excellent customer service
- **Accredited training and development**: Both for in-service and initial training

### Structure

- Independent institute which represents all customer service professionals
- Activities are paid for by individuals or companies
- The ICS also obtains membership fees from individuals and companies to gain access to their research, tools and training services
- ICS is not-for-profit
Improving Customer Satisfaction in Rwanda
What should the government do to improve customer service?

Establish a customer service institution to:

- Independent institutions with some public funding initially
- Managed by a board of members with interest in customer service
- Ultimately self-sustaining through membership fees and charges for services

Create customer service benchmarks
- Benchmarks are to be suitable for both public and private sector institutions.
- Benchmarks should cover all aspects of an organization’s operations.
- Benchmarks should be voluntary for the private sector, but could be mandated for public institutions.

Develop training courses
- Training courses should be created for in-service and initial training.
- The institution should accredit training to establish a network of professionals.
- The institute can provide recruitment support for customer service posts.

Undertake a campaign for better service
- Raise awareness of customer rights and promote the organizational benefits of customer satisfaction.
- Promote organizations which have made significant customer care improvements by championing them as “role models.”

Create annual index of customer satisfaction
- Undertake an annual survey of customer satisfaction to collect follow up data on the five pillars.
- This survey should provide comparative data over time and also seek to measure the impact of poor/strong customer service.
# The Rwandan Customer Satisfaction Survey

Why is it important? What data is required?

<table>
<thead>
<tr>
<th>Rationale</th>
<th>Research Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>In a competitive market, customer satisfaction is a key differentiator and an essential element of business strategy.</td>
<td><strong>Customer Survey</strong></td>
</tr>
<tr>
<td>Satisfied customers are loyal customers who book repeat orders and refer others to your business.</td>
<td>1. Customer Satisfaction Survey:</td>
</tr>
<tr>
<td>A 2007 OTF tourism survey revealed that channel partners perceive Rwanda as having a poor customer service culture.</td>
<td>- Annual</td>
</tr>
<tr>
<td>Poor customer care will sabotage Rwanda’s efforts towards economic growth and development. Tourists, investors, and customers, are Dissatisfied and will leave a business.</td>
<td>- Nationwide</td>
</tr>
<tr>
<td>How do we turn the poor customer service culture around?</td>
<td>- Across multiple sectors (public and private)</td>
</tr>
<tr>
<td></td>
<td>- Wide dissemination</td>
</tr>
<tr>
<td></td>
<td>2. Organization Customer Care survey:</td>
</tr>
<tr>
<td></td>
<td>- Measure investments in customer care</td>
</tr>
<tr>
<td></td>
<td>- Identify main obstacles to better customer care</td>
</tr>
<tr>
<td></td>
<td>- Assess training needs</td>
</tr>
</tbody>
</table>
Customer Satisfaction Survey

Overall satisfaction: comparison by residency

Non-Rwandan residents are more satisfied with customer service than Rwandan residents. Their expectations are slightly less and their experience is more positive (may be due to shorter waiting time, and also the places they frequent).
Customers expect the most regarding issues of timeliness and problem solving. Yet, it is specifically in these areas, as well as in communication, that their experience was rated the lowest.
Customer Satisfaction by attributes
Specific attributes Rwandan Vs non-Rwandan residents

Non-Rwandan residents are more satisfied with customer service compared to residents; however, they are both least satisfied with communication, timeliness and problem solving.