

HISTORIC SCOTLAND, EDINBURGH, SCOTLAND

Sustaining High Quality Customer Service through Sophisticated HR practices

Introduction

Historic Scotland is a national agency charged with safeguarding and promoting Scotland's historic environment. The agency has a wide remit ranging from advising on policy matters to operating leading historical attractions to educating the public about Scotland's historic past to conserving and repairing historical monuments and buildings. With 345 properties in their care, around 80 of which are staffed, Historic Scotland has a strong national presence and works closely with Scotland's 32 local councils. It is the largest paid tourist attraction operator in Scotland, with Edinburgh Castle listed as the number one paid admission visitor attraction in Scotland, and with both Stirling Castle and Urquhart Castle also featuring in the top 10 paid admission visitor attractions list for 2006 and 2007.

Historic Scotland employs around 1,100 staff spread across the length and breadth of Scotland from Orkney, Shetland and the Western Isles in the north to the Borders and Dumfries and Galloway in the south. Staff working in the agency possess a specialised and varied skill set from stone-masonry, archaeology and joinery to tour guiding, marketing and administration. In this regard, the agency is divided into several teams along function lines, including visitor services, events management, product management, business development, policy department, research and education, technical and conservation, finance and human resources.

This case study will focus on the HR practices employed by Historic Scotland in order to sustain a high level of customer service. In particular, we look at the mystery visit programme and how this has focused employees on achieving the targets and standards set by the agency. Two hour-long interviews were conducted with the Training Manager and Quality Services Manager. The interviews focused principally, but not exclusively, on customer-facing staff and provide valuable insights into how customer service standards are developed and maintained across the agency.

Sourcing Motivated Staff

Finding motivated staff with a passion for history and heritage has been critical to the success of Historic Scotland. Being responsive to visitor needs and creating a welcoming environment requires staff with good interpersonal skills. In contrast to many hospitality organisations who attract university students and younger employees, the demographic profile of staff at Historic Scotland is quite distinct as Quality Services Manager, Doreen Waller explains:

A lot of staff are in their second or third career. There are a lot of folk who've had a high profile with high earnings, doing something fabulous. These are people who've sometimes had a high-flying job and are in their 50s and 60s; are interested in history; want a quieter

job doing something that they enjoy and are interested in meeting people from all round the world. The pay isn't great, but people enjoy working for the organisation and working at the sites they work at or in the district they work in. They take real pride in the property they are looking after. Folk are so proud of their sites – it's like it's their castle or their abbey and they take great pride in saying that this is what they do.

As many staff view working for Historic Scotland as a hobby, staff turnover in the agency is relatively low. A significant number of staff also consider working for the agency as being in some way linked to national identity (or working for Scotland). For this reason, Historic Scotland has not always found it easy to attract local staff to work on sites, however, there are relatively few non-native employees working for the agency. Some staff benefit from flexible working hours and the seasonality of some employment contracts suits many employees who are happy to work at historic castles and monuments in the summertime, but not during the winter.

Regular consultation with employees through meetings and circulars ensures that vertical and horizontal communication is an ongoing process. However, the sometimes slow pace of change can occasionally be a source of frustration to staff. As Quality Service Manager, Doreen Waller, explains, the nature of the public service means that change is most often incremental and happens with less pace than in the private sector: When you work for an organisation which depends on 2/3 of its funding from the government, (1/3 of our funding comes from our own sources, through the shops, admission charges, weddings, private functions etc) there are certain things we have to do before we can make a change. And some people find that a bit frustrating – they think we should be able to do things quicker.

Sustaining High Levels of Customer Service: The Mystery Visit Programme

With a large number of sites scattered across Scotland, Historic Scotland has worked hard to ensure that a high level of customer service is provided to all visitors. With three sites in the top 10 paid admission visitor attractions in Scotland, the aim of the agency is to provide visitors with a world-class experience. Underpinning such ambitions are a competency framework for developing staff skills, the spring and autumn meets, and the Mystery Visit programme. Each of these aspects will now be discussed in turn.

Managing individual performance is important to ensuring that site and agency targets are achieved. In addition, performance management links into the accountability and value-for-money standards that the agency needs to meet as part of its public service function. Training manager John Whittaker explains the evolution of the competency based performance management system at Historic Scotland in the following terms:

The civil service tends to be quite fixed in ensuring that staff have annual reports and annual reviews but I think people become too familiar with this and to be honest, it wasn't being taken seriously. So we went out to the organisation in a consultation exercise and asked what do you want this the review process to look like? [While the organisation contains a lot of technical areas], it would have been a very easy thing to say - here is a specialised review for each person, but that would have been an unmanageable situation. We

introduced a competency framework which was about how people did their job; therefore what they did is recorded and how they did it. So we recruit on competency, we promote on competency, we develop on competency and if necessary we would use competency to get rid of someone.

The spring and autumn meets (for visitor service and business development teams) allow the agency to communicate with employees and receive feedback and suggestions on where improvements can be made. The spring meet provides an opportunity to prepare employees for the season ahead. It outlines the targets and standards to be achieved by the whole team and opens up internal networking opportunities for employees to meet staff from other sites across Scotland. The autumn meet reviews the results of the season and captures lessons learned so that they can be implemented the following season. Quality Service Manager, Doreen Waller explains the importance of the spring and autumn meets in the following terms:

We have twice a year a big meet [spring and autumn]. The spring meet is an opportunity to discuss what's coming up, what are we trying to achieve, what our targets are for this summer. We have targets that are set, but it is the staff who decide how they want to achieve that. We have a set customer service target which is the same for the whole agency and a commercial target, which is broken down into regions, districts then sites. Staff can decide how they are going to manage their commercial targets. For example, we don't tell them how many souvenir guidebooks they need to sell, but we do communicate to them the amount their site needs to make. But with our mystery visit [customer service] target, we state the internal target is 90% and you need to look at your level of service and the standard of service you provide and look at ways to ensure consistency. At the end of the season, we have an autumn rally and this covers the 2 regions – north central and south central – we review what's been good over the season, what's not been so good, what needs to change, what ideas have you to bring about that change.

The intervention Historic Scotland uses to achieve high levels of customer service is called the Mystery Visit Programme. It involves a mystery visitor calling unannounced to a Historic Scotland site and examining service quality in relation to a checklist of standards. Training Manager, John Whittaker explains the rationale underpinning the Mystery Visit Programme in the following terms:

Mystery visits have been undertaken by Historic Scotland for 11 years. The Mystery Visit Programme is linked into the bigger picture and the performance management system. It is a management tool for getting better at what we do. We have got Edinburgh castle as the number one paid admission visitor attraction in Scotland - we can't achieve top ten status and not be doing good things. We need to get visitors to go to our attractions and the only way we can do that is to be world class in the way that we do things. So all the training we do for our visitor services staff is aimed at helping them to deliver a

world class service. As soon as you say you are world class you have to keep improving or you lose that level, you need to keep doing things, so we are adapting it, moving the goalposts along a little bit each time.

In essence, the aim of the mystery visit programme is to get timely feedback on what a normal visitor would say about their experience. For Historic Scotland, the mystery visit target is a key performance target that is reported to Scottish ministers. Currently, the target is a rolling target over a 3 year period – with the target to ministers set at 88.5% and the internal target set at 90%. All Historic Scotland sites are assessed on the same standards and feedback on the mystery visit is provided to the site within 7 days. The larger sites such as Edinburgh, Stirling and Urquhart get 12 mystery visits a year, with smaller sites receiving 2, 4 or 6 visits a year. As well as providing valuable feedback on standards, the Mystery Visit Programme indicates areas where further training and development are required. As Training Manager, John Whittaker explains:

We have also found that the last couple of years that people are not very comfortable making a sales pitch, so we are working on them trying to get a conversational sales pitch. So part of the process is to try and start a conversation to elicit visitors' needs. Some people find this difficult and revert to going through a list until somebody says 'yes' but that is not really selling. So we are doing back up training to help them with that. The Mystery Visit Programme looks at whether someone has been given appropriate options and whether their needs were checked out or thought through. The Mystery Visit Programme also identifies people who get 100% throughout the year and they are rewarded.

The mechanism through which individuals are rewarded for high level customer service has also changed. Where previously, if someone received 100% on a mystery visit, a bottle of champagne or box of chocolates was awarded, this has now been replaced by monetary awards. A cash award of a minimum of £50, with no maximum amount is granted in recognition of world-class customer service. Historic Scotland also presents special achievement awards to individuals who perform an outstanding service and individual and team awards are also available for attaining high performance.

Conclusion

This case study looked at the importance of delivering world-class customer service at Historic Scotland. It examined how this ambition is fulfilled through the recruitment and retention of skilled passionate staff and the maintenance of high quality customer service standards. A strong brand linked to national identity combined with flexible working conditions is viewed as appealing to many older workers interested in pursuing their second or third career. Over the past 11 years, the Mystery Visit Programme has played an important role in developing and upholding service standards. Clearly, much of the success enjoyed by Historic Scotland derives from its strict adherence to service quality and through capturing learning from season-to-season through regular consultation and communication with staff. Recruiting, rewarding and retaining skilled staff has seen Historic Scotland go from strength-to-strength.

