Behavioural Research Course for Service Leaders: Field Trials, Control Groups, Scaling Decisions

3 – 7 May 2027
Cape town

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Programme Summary

Behavioural research is the subject of this one-week training course for customer experience, service design and insight leaders at managerial level, ending in a field trial plan for one customer-facing service. Many service changes are launched on opinion, and results are then read without a comparison group. The programme moves from observing real behaviour to testable hypotheses, trial design with control groups, the reading of results and a scaling decision. Mars Training Centre UK delivers this programme on behavioural research to mixed-organisation cohorts.

The Business Case

Customers often act differently from what they say in surveys and workshops. Service teams that change scripts, forms or reminders without a test cannot tell whether a gain came from the change or from the season, the campaign or chance. A small trial with a control group costs little beside a full rollout, and it gives sponsors evidence that a change should be scaled, adjusted or stopped.

- Rollout Waste: Falls as weak changes are stopped after a small trial instead of a full launch.
- Completion and Response Rates: Improve as forms, messages and steps are tested against real behaviour.
- Decision Confidence: Rises as results are read against a control group and recorded.

Principles and Evidence Base

- OECD BASIC Toolkit for Applied Behavioural Insights: Frames the Behaviour, Analysis, Strategies, Intervention and Change cycle and its ethical safeguards, used in Sessions 1 to 4.
- ISO 20252 Market, Opinion and Social Research: Supplies the vocabulary and service requirements applied to project records and data handling in Sessions 3 and 5.
- Randomised Controlled Trial Practice: Structures the comparison of treatment and control groups designed in Session 3.

Intended Participants

- Customer experience leaders who decide which service changes are tried and kept.
- Service design leads who shape forms, journeys and messages.
- Insight and research managers who commission and read customer studies.
- Operations managers who host trials in branches, contact centres or field teams.

Typical settings include retail banking, utilities, healthcare administration, transport and public services.

Learning Outcomes

1. Participants will be able to diagnose the gap between what customers say and what they do in a service journey.
2. Participants will be able to construct testable hypotheses from observed behaviour.
3. Participants will be able to design a low-cost field trial with a control group and a clear measure.
4. Participants will be able to evaluate trial results for size, noise and bias.
5. Participants will be able to prioritise service changes for scaling, adjustment or withdrawal.
6. Participants will be able to justify a trial and its decision to an executive sponsor.

Programme Structure

Day 1: Behavioural Research and Observed Behaviour

What do customers actually do, and where does it differ from what they say?

- BASIC Behaviour Scoping Sheet
- Service Journey Observation Protocol
- Say-Do Gap Log
- Behavioural Barrier Checklist
- Research Ethics Safeguard List

Day 2: Diagnosing Behaviour and Forming Hypotheses

Which barrier explains the behaviour, and how can it be stated so it can be tested?

- Frontline Shadowing Notes
- Form and Message Friction Audit
- Barrier Ranking Matrix
- Hypothesis Statement Template
- Intervention Option Grid

Day 3: Designing Trials with Control Groups

How is a small trial built so that its result can be trusted?

- Treatment and Control Group Plan
- Random Assignment Method
- Outcome Measure Definition
- Trial Sample Size Estimate
- Trial Record under ISO 20252

Day 4: Reading Results and Deciding on Scale

Did the change work, and is the evidence strong enough to scale it?

- Treatment and Control Comparison Table
- Noise and Bias Check
- Effect Size Reading
- Scale, Adjust or Stop Decision Grid
- Rollout Risk Register

Day 5: Field Trial Plan for One Service

Do the earlier tools form one plan that a sponsor can approve?

- Applying the Session 1 Say-Do Gap Log
- Testing the Session 2 Hypothesis Statement
- Checking the Session 3 Control Group Plan
- Rehearsing the Session 4 Decision Grid
- Completing the Field Trial Plan and Sponsor Note

Methodology

The programme uses a data workshop built on a prepared file for one bank and one public service, each with journey notes, form drafts, anonymised response data and a sample trial record. Participants work in small groups, plan trials, read supplied results and defend their conclusions to peers.

- Suggested activity: Turning an observed drop-off point into a testable hypothesis.
- Suggested activity: Assigning customers to treatment and control groups and defining the measure.
- Suggested activity: Reading a supplied result and arguing whether to scale, adjust or stop.

Capstone Output

Each participant completes a field trial plan for one customer-facing service. It holds a hypothesis, a treatment and control design, an outcome measure, a sample estimate, an ethics note and a decision rule for scaling. The plan is used at work to brief a sponsor and the teams that host the trial.

Frequently Asked Questions

Is a behavioural research course suitable for leaders without a statistics background?

Yes. Behavioural research is taught through a prepared case file, templates and result tables. It assumes experience in customer experience, service design, insight or operations work, but no earlier statistical training.

Which standards does behavioural research rest on?

Behavioural research rests on the OECD BASIC Toolkit for applied behavioural insights, ISO 20252 for market, opinion and social research, and established randomised controlled trial practice.

How is the plan from behavioural research used at work?

You use the field trial plan to brief your sponsor, agree the design with the teams hosting the trial and set the rule for deciding whether the change is scaled.

How does behavioural research differ from a market research course?

Behavioural research concentrates on testing what customers do in a live service against a control group, while a market research course concentrates on surveys, sampling and reporting of stated views.