

# WORKFORCE SOLUTIONS - WESTHEIMER CUSTOMER SURVEY PROJECT SCOPE

February 3, 2014

## OVERVIEW – NEW & IMPROVED SERVICES

### 1. Project Description

To provide a means to accurately assess how we are servicing our customers and the demographics of our target audience. Also, to gather ideas for services needed and/or wanted by our customer base.

### 2. Project Scope

Creating various surveys via [www.surveymonkey.com](http://www.surveymonkey.com) will allow us the ability to gauge our customer satisfaction in our various areas of service. From our Resource Room, Employment Counselors, Personal Service Representatives through to our hard and software, we can hear firsthand from our customers how we can better serve them. Through this medium, we can see the necessary analytics that will in turn provide us the necessary content and context to form the strategies and implementation to make our centers customer-centric. A team will take this information and provide a more in depth follow up with the customer as to “close the loop” which will allow for the potential prioritization of implementation on new, improved or expanded services.

### 3. Implementation Costs

Survey Monkey is web-based. So, there is no memory used or threat of a virus as a result of using this service. Westheimer is currently using the “Basic” version which is free but, limited in capability. The recommendation is to purchase the Select Plan or the Gold Plan this is based on the expanded functionality and analytics.

BASIC DESIGN FEATURES	SELECT – 17.00/mo DESIGN FEATURES	GOLD – 25.00/mo DESIGN FEATURES
<ul style="list-style-type: none"> <li>○ 10 questions per survey</li> <li>○ 100 responses per survey</li> <li>○ Easy-to-use web-based survey tool</li> <li>○ 31 survey templates</li> <li>○ 15 types of questions</li> <li>○ All languages supported (Unicode)</li> <li>○ Randomize &amp; sort answer choices</li> <li>○ 15 pre-set visual themes</li> <li>○ Survey completion progress bar</li> <li>○ Auto-numbering for pages &amp; questions</li> <li>○ Validate/require survey responses</li> <li>○ Fully accessible &amp; 508 compliant</li> </ul>	<ul style="list-style-type: none"> <li>○ Unlimited questions</li> <li>○ Unlimited responses</li> <li>○ Easy-to-use web-based survey tool</li> <li>○ 51 survey templates</li> <li>○ 15 types of questions</li> <li>○ All languages supported (Unicode)</li> <li>○ Page logic</li> <li>○ Question logic</li> <li>○ Customized themes</li> <li>○ Brand your survey with a logo</li> <li>○ Randomize &amp; sort answer choices</li> <li>○ 15 pre-set visual themes</li> <li>○ Survey completion progress bar</li> <li>○ Auto-numbering for pages &amp; questions</li> <li>○ Validate/require survey responses</li> <li>○ Fully accessible &amp; 508</li> </ul>	<ul style="list-style-type: none"> <li>○ Unlimited questions</li> <li>○ Unlimited responses</li> <li>○ Easy-to-use web-based survey tool</li> <li>○ 51 survey templates</li> <li>○ 15 types of questions</li> <li>○ All languages supported (Unicode)</li> <li>○ Page logic</li> <li>○ Question logic</li> <li>○ Random assignment</li> <li>○ Question &amp; answer piping</li> <li>○ Question randomization</li> <li>○ Customized themes</li> <li>○ Brand your survey with a logo</li> <li>○ Randomize &amp; sort answer choices</li> <li>○ 15 pre-set visual themes</li> <li>○ Survey completion progress bar</li> <li>○ Auto-numbering for pages &amp; questions</li> <li>○ Validate/require survey responses</li> <li>○ Fully accessible &amp; 508 compliant</li> <li>○ Custom redirect upon survey completion</li> <li>○ Custom "thank-you" page</li> </ul>

<p><b>COLLECTION FEATURES</b></p> <ul style="list-style-type: none"> <li>○ Send out your survey via weblink, email, or Twitter</li> <li>○ Share your survey on Facebook</li> <li>○ Embed your survey into a page or on your website</li> <li>○ Deploy your survey via a website pop-up</li> <li>○ Send your survey using our email manager</li> </ul> <p><b>ANALYSIS FEATURES</b></p> <ul style="list-style-type: none"> <li>○ Real-time results</li> </ul> <p><b>SUPPORT FEATURES</b></p> <ul style="list-style-type: none"> <li>○ 24x7 email support</li> <li>○ No expedited email responses</li> <li>○ No phone support</li> </ul>	<p><b>compliant</b></p> <ul style="list-style-type: none"> <li>○ Custom "thank-you" page</li> <li>○ Printable PDF version</li> </ul> <p><b>COLLECTION FEATURES</b></p> <ul style="list-style-type: none"> <li>○ Send out your survey via weblink, email, or Twitter</li> <li>○ Custom URL</li> <li>○ Share your survey on Facebook</li> <li>○ Embed your survey into a page or on your website</li> <li>○ Deploy your survey via a website pop-up</li> <li>○ Send your survey using our email manager</li> <li>○ Enhanced security (SSL)</li> </ul> <p><b>ANALYSIS FEATURES</b></p> <ul style="list-style-type: none"> <li>○ Real-time results</li> <li>○ Multiple custom reports</li> <li>○ Filter &amp; cross tabulate responses by custom criteria</li> <li>○ Download responses</li> <li>○ Create &amp; download custom charts</li> <li>○ Share responses</li> </ul> <p><b>SUPPORT FEATURES</b></p> <ul style="list-style-type: none"> <li>○ 24x7 email support</li> <li>○ Customer support email responses in 2 hours or less</li> </ul>	<ul style="list-style-type: none"> <li>○ Printable PDF version</li> </ul> <p><b>COLLECTION FEATURES</b></p> <ul style="list-style-type: none"> <li>○ Send out your survey via weblink, email, or Twitter</li> <li>○ Custom URL</li> <li>○ Share your survey on Facebook</li> <li>○ Embed your survey into a page or on your website</li> <li>○ Deploy your survey via a website pop-up</li> <li>○ Send your survey using our email manager</li> <li>○ Enhanced security (SSL)</li> </ul> <p><b>ANALYSIS FEATURES</b></p> <ul style="list-style-type: none"> <li>○ Real-time results</li> <li>○ Text analysis</li> <li>○ SPSS integration</li> <li>○ Multiple custom reports</li> <li>○ Filter &amp; cross tabulate responses by custom criteria</li> <li>○ Download responses</li> <li>○ Create &amp; download custom charts</li> <li>○ Share responses</li> </ul> <p><b>SUPPORT FEATURES</b></p> <ul style="list-style-type: none"> <li>○ 24x7 email support</li> <li>○ Customer support email responses in 2 hours or less</li> </ul>
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#### 4. Process Flow

The first phase is the initial collect. Upon entry into the various centers, the Resource Specialists will “soft sell” the customers on taking the survey which will have an icon on the desktops. The survey will be comprised in three basic sections:

1. Customer Information/ Demographics – Age, nationality, gender, contact information or preference, etc
2. Center information – Frequency of visits, services used, quality of service, etc.
3. Service Suggestions – Enhancements, Process Improvements, etc.

At the end of each month, data will be extracted and reviewed by the managers and supervisors. Within the static data and the trends (if there be any) strategies can be developed to coach/mentor/develop the staff. The information can also serve as a guide for various improvements in processes and procedures. The findings will then be discussed with the staff at large and in the specific service areas for implementation.

The secondary collect is the next phase. In the initial collect the demographic and contact information will be forwarded to a "Follow Up Team" This team will contact the customer to perform a more in depth and personal interview in order to gain further insight on their experience within the center and also within the system that is Workforce Solutions. The interview questions should follow the same basic scope as to maintain synchronicity to obtain synergy. The information will be used to construct reports that will form the basis for the strategic implementation of enhancements and employee development company-wide.

## 5. Results

**Customer satisfaction:** Satisfied customers are those who do not have outstanding negative issues concerning us on their mind. This doesn't mean everything has always been perfect. Sometimes things may not have gone all right. In all such situations we give our customers a chance to talk to us. Sympathetic listening to customers is essential. Online surveys provide a way where customers get a chance to get their side of the story out without being interrupted. A second essential is follow-through. Proper tools of analysis will help us segment our customers into different categories based on what we need to do in return.

**Effective Communication with Customers:** By inviting customers to talk to us and through careful design of our survey we can effectively inform our customers about things they may not know or remind them of important changes or innovations in our organization. This is clever because customers will read our survey more carefully than most other communication we send them. The survey will give us the necessary information to know WHO are customers are, which will in turn aide us in HOW to communicate/interact with them more effectively.

**Spotting Trends/Reporting:** Beyond understanding the drivers behind satisfaction of our customers, we can benefit from the wisdom of the masses by asking them for their ideas and spotting patterns in their feedback. Spotting such trends ahead could offer us significant information that will enable us to improve our services. The reporting functionality can be used to personalize the business as management shares the results with the staff.

**Improved Services:** The analytics that are generated as a result of the surveys will provide demographic information to improvement suggestions, which can be used for ongoing coaching and development of the staff. This coaching/development based in the "KYC" paradigm (Know Your Customer) will enable us to accurately empower our customers better and undergird our efforts to get them employed.

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### Team

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