Customer Experience Survey Templates: User Guide

VPFO Communications & Engagement

The VPFO Communications & Engagement team has created two survey templates to support collecting customer experience feedback for our VPFO teams and services. These templates use benchmarked questions to assess customer service quality and satisfaction, to support the portfolio in standardizing how we evaluate customer experience and to inform our service standards.

If you are interested in evaluating customer experience in your area, please reach out to us at communications@vpfo.ubc.ca to get support we can connect you with our central resources and help you achieve your survey objectives.

Before using our templates, here are some questions to consider:

1. What is the goal of your survey?
2. What data do you need to collect? (metrics)
    a. Our templates were made with the purpose of measuring customer service experience
3. Who are the stakeholders involved?
    a. Who is your survey target audience?

We have two survey templates available to help measure customer service experience:
(See instructions below on accessing these templates)

Template 1:

- **Full VPFO Customer Experience Survey (preview link)**
- In addition to overall service satisfaction, this longer survey explores three basic service dimensions:
    - reliability, timeliness and efficiency, care and concern
- Takes 2-3 minutes to complete

Template 2:

- **Quick Pulse VPFO Customer Experience Survey (preview link)**
- This "pulse" survey version measures overall service feedback and captures demographic information
- Takes about 1 minute to complete

Survey Planning Questions:

1) **Which campuses?** Do you anticipate any respondents being from the Okanagan campus (i.e. should you include Okanagan in the demographic funnel).
2) **Which survey version?** Are you interested in taking a quick pulse (how would you rate our service, how easy was it to accomplish what you needed), or in asking for further feedback on other service dimensions (reliability, timeliness and efficiency, care and concern)?
3) **Which questions?** If you're including service dimension questions, review the options for R1, TE1, and CC1. Keep statements that are relevant for you, and delete those that are not. Also consider whether or not you would like to "force" responses.
4) **What else to add?** Are there any other core questions you'd like to gather feedback on that you should add to the base survey?

Distribution Questions:

1) **How do you intend to reach respondents?**
    a. Do you use any automated funnels that have a "closing" communication? If so, is that a natural place to ask for feedback?
    b. Is there a web page where we could include the survey to drive feedback that falls outside of a transactional business process?

Setting up Qualtrics and Access to the VPFO Group:

At UBC, **Qualtrics** is the primary tool for designing surveys available to all staff, faculty members and students. Users can login at https://ubc.qualtrics.com with their **CWL account** to access this survey tool. Please contact the IT team or visit the IT website for more information on setting up your account.

Within Qualtrics, we have set up a group named "VPFO". This enables us to collaborate and hare survey templates and resources relating to customer experience within the VPFO portfolio. If you would like to be added to this group library, please reach out to communications@vpfo.ubc.ca.

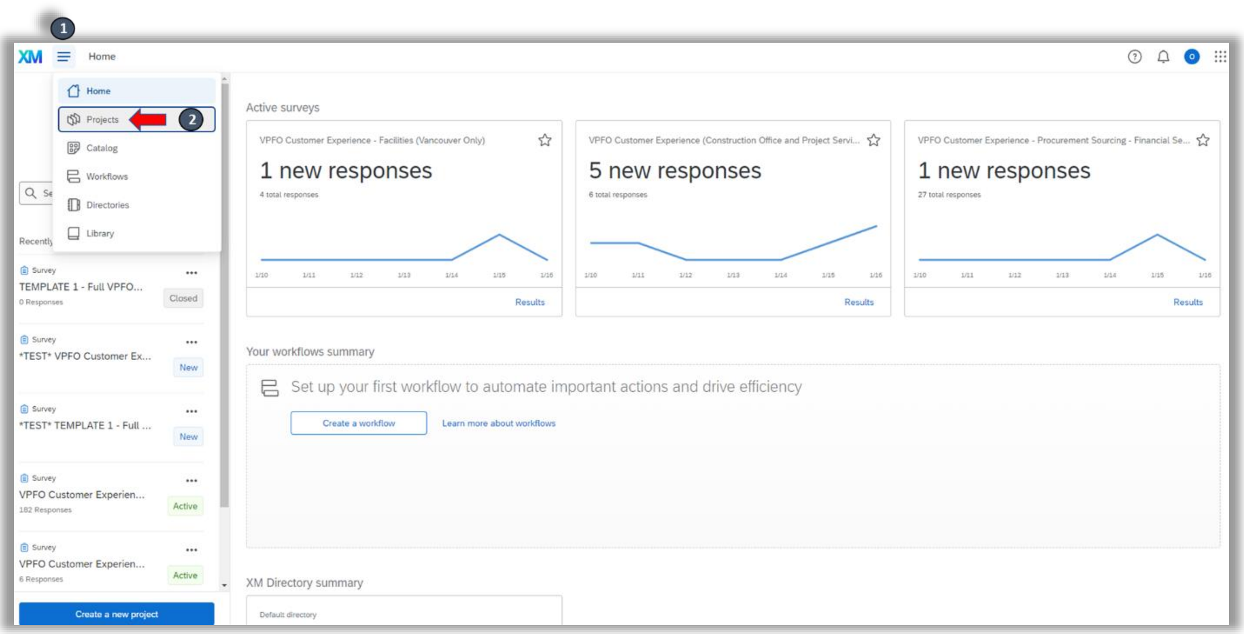
All VPFO users deploying customer experience surveys should **"collaborate" their surveys with the VPFO** group to enable consolidated data management. Please **see instructions below** or get in touch with Communications & Engagement if you need support.

Accessing VPFO Survey Templates in Qualtrics

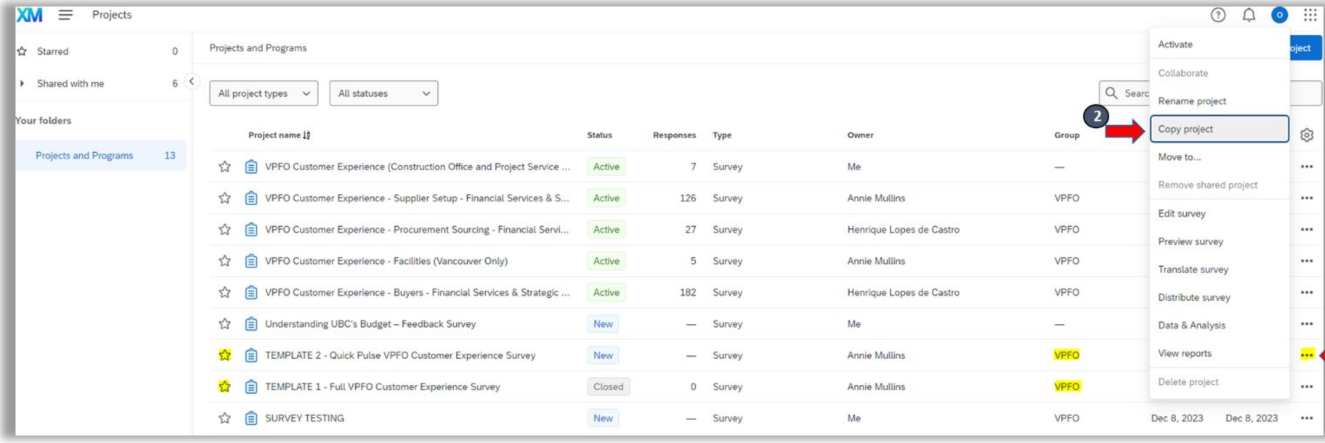
How to create surveys using the customer experience survey templates in the VPFO group library

Step 1 – Once you set up your Qualtrics account, contact Communications & Engagement to be added to the VPFO group in Qualtrics.

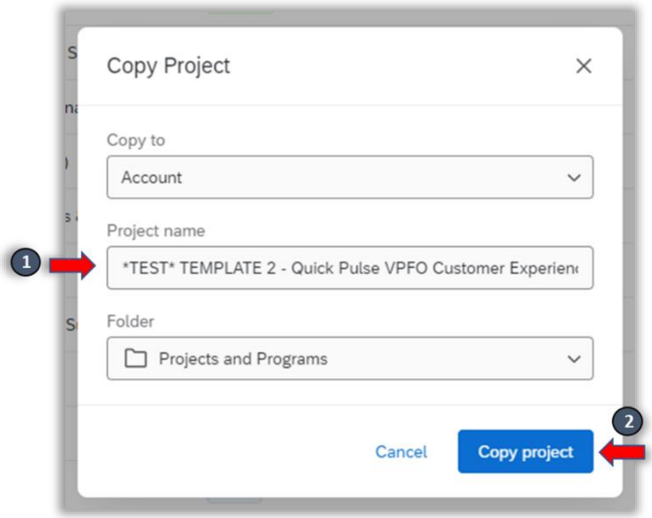
Step 2 – After logging in, find the **"**Projects" page in the main menu (see 1 & 2).



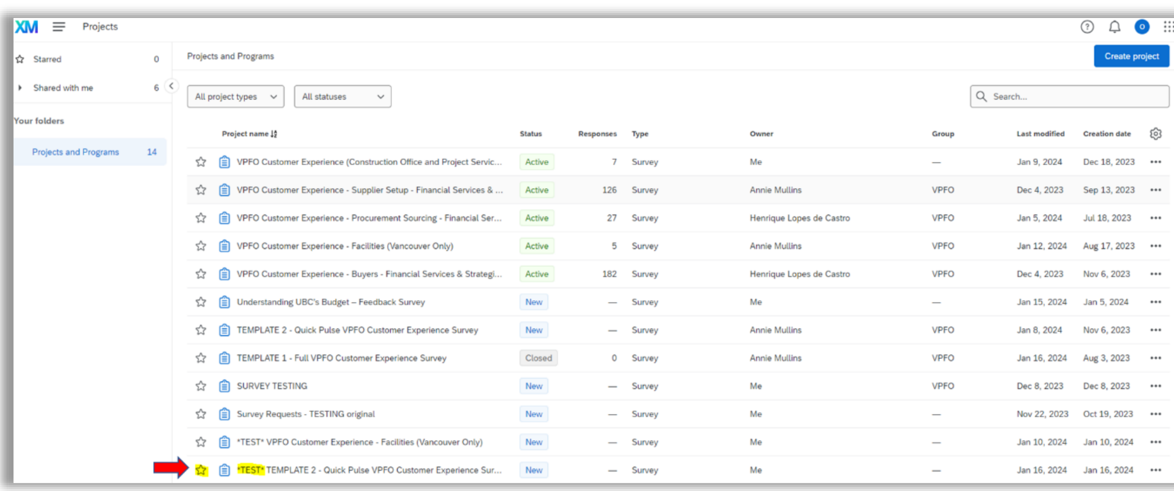
Step 3 – If you have been successfully added to the VPFO group, you should see survey Templates 1 & 2. Select the 3 dots "…" (see 1) on the survey template you want to use and then select "Copy project" (see 2)



Step 4 – Using Template 2 as an example, rename your survey (see 1) and leave all the other fields as is. Then select "Copy project" (see 2).



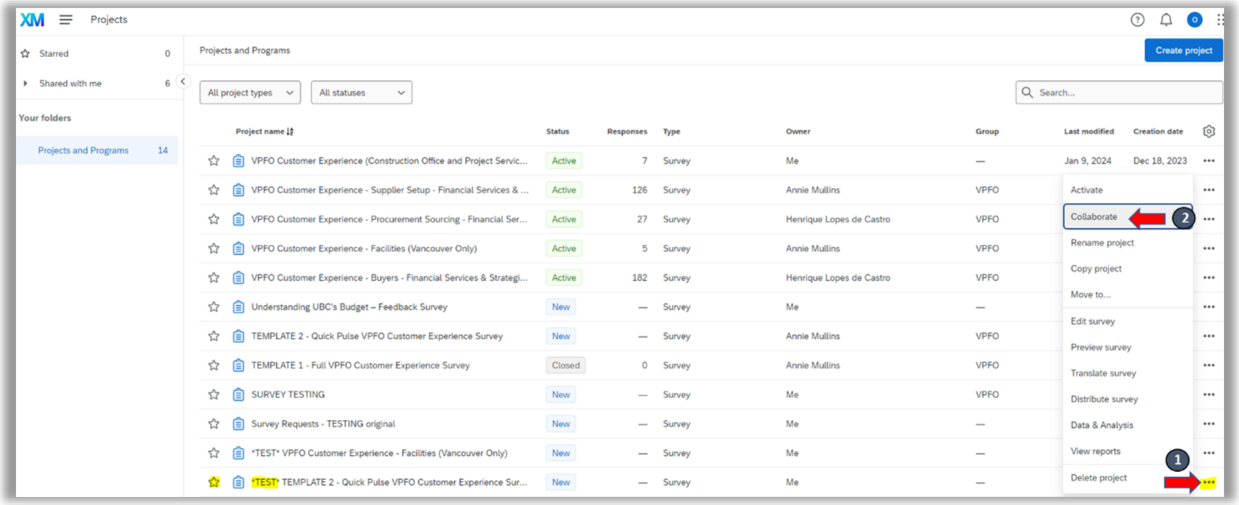
Step 5 – Your new survey will appear on your projects page. Remember to share any surveys made with the VPFO group. (See the next set of instructions below).



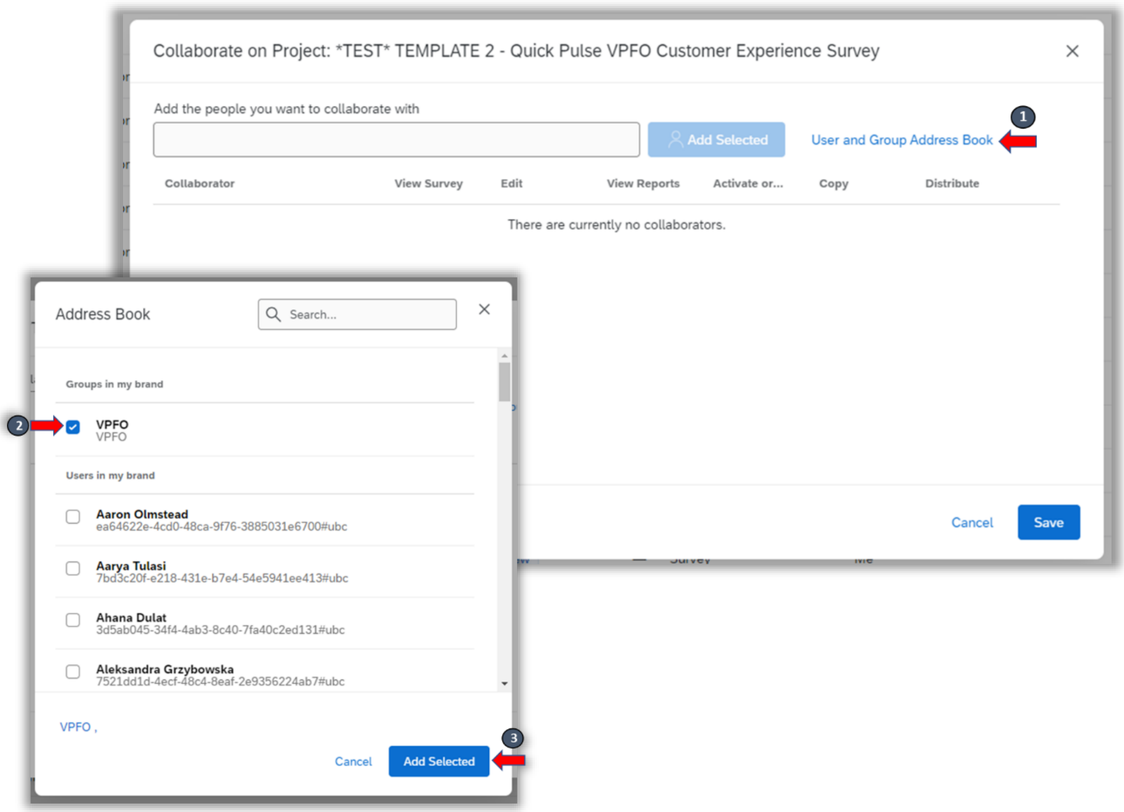
Sharing Surveys with the VPFO group

How to collaborate on surveys with members in the VPFO group

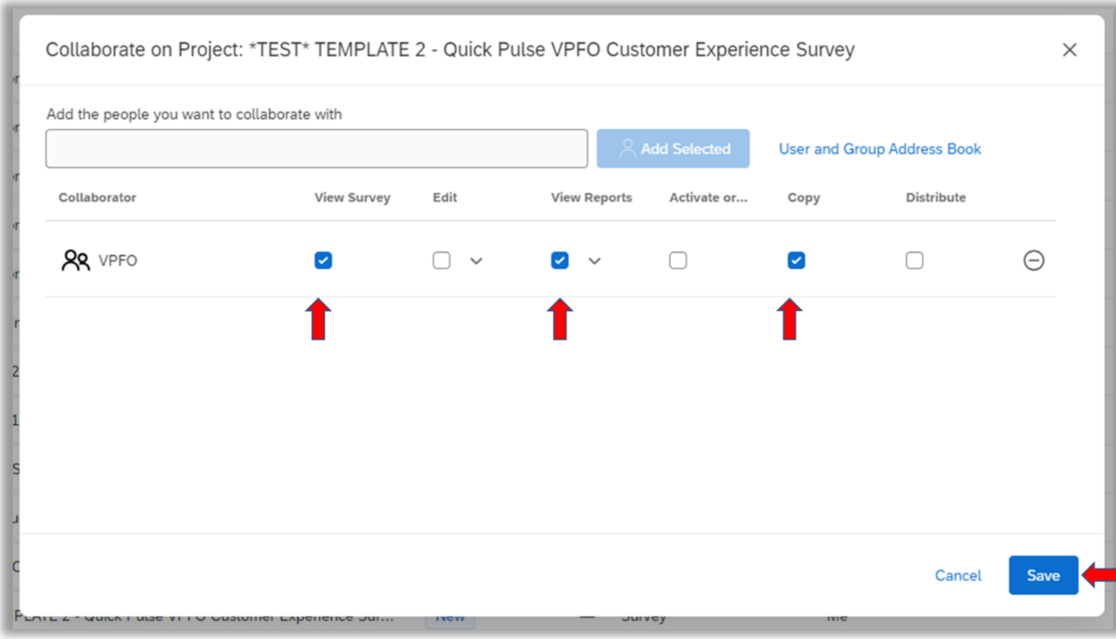
Step 1 – Select the 3-dots "…" on the survey you would like to share (see 1). Then select "collaborate" (see 2).



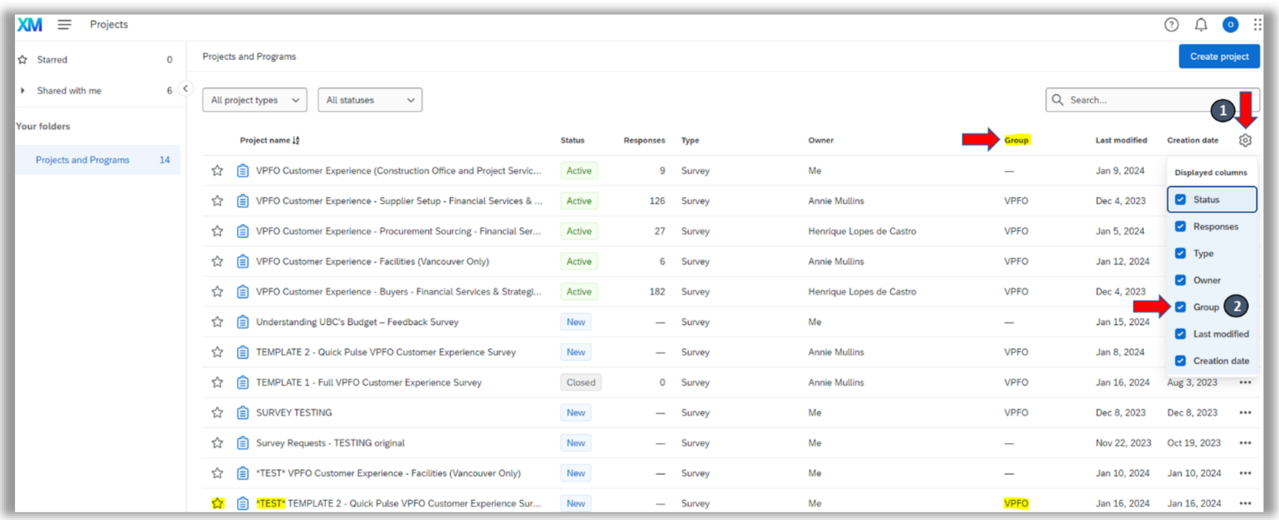
Step 2 – Select "User and Group Address Book" (see 1). In the "Address Book" pop-up, ensure VPFO checkbox is selected (see 2). Then click "Add Selected" (see 3).



Step 3 – Ensure **only** the permission boxes “View Survey”, “View Reports” & “Copy” are selected. This may mean deselecting other boxes. Then select “Save”.



Step 4 – Check that “VPFO” is listed in the “Group” field. You may have to make sure “Group” is selected as a visible column in the settings (see 1 & 2). VPFO group members are now able to view that project.



Contact Communications & Engagement at any time to get support on your customer experience survey.