

# INITIAL HIGH-LEVEL B&F 2009 CUSTOMER SATISFACTION

## SURVEY RESULTS

### I. BACKGROUND

The Business and Finance Strategic Framework identifies **Provider of Choice** as one of the three main goals for Business and Finance, with Customer Satisfaction being the main metric for this goal. A measurement was first taken through a B&F customer satisfaction survey administered during June, 2005 and again during May 2007. On January 8, 2009, the Business and Finance Customer Satisfaction Survey Team (a cross-functional team consisting of Valerie Amo, Greg Lambert, Catherine Lilly, Steve Reck, Jason Rosenblatt, Robert Thomas, Gary Uptigrove, Grant Winston, and Paul Parzuchowski, consultant) met to administer the survey for the third time. The team was charged with maintaining the functionality and look of the report tool but to move it to a different platform. The team has had a goal of maintaining or increasing the participation rate for all returning core services while also identifying new core services to survey.

The 2009 B&F Customer Satisfaction Survey was distributed through an independent online website (Zoomerang) and was open from March 19 to April 14, 2009. This report contains the high-level results of the 2009 Customer Survey, comparisons with the 2007 and 2005 results, and describes the next steps in distribution of results and data analysis.

### II. SURVEY ADMINISTRATION

Based on feedback from B&F Senior Staff and the 2009 Customer Survey Advisory Team, the B&F Customer Satisfaction Team made several improvements to the survey and the process. These improvements included: increasing the number of identified targeted customers, adding and revising Unit additional questions, updating core service descriptions, more closely matching units with managers who wanted customer survey feedback, engaging customer collaborators to distribute survey links to their networks, including core service websites with each core description, and providing more access to surveys for customers who wished to give feedback. In addition, this year we exclusively used the MAIS targeted email process, which helped to keep email survey invitations from being blocked by firewalls and minimized duplicate messages.

#### SURVEY DESIGN: SERVICE ATTRIBUTES LIST FOR 2009 (UNCHANGED FROM 2007)

1. Understands the customer's business needs
2. Understands and explains University policies and procedures
3. Communicates service standards
4. Demonstrates functional/technical expertise
5. Communicates service changes effectively
6. Implements service changes effectively
7. Easily accessible service or service provider
8. Provides friendly and courteous service
9. Overall Satisfaction

## SURVEY DESIGN: B&F CORE SERVICES LIST UPDATED

Below is a list of the B&F Core Services who participated in the 2009 Customer Satisfaction measurement process, some for the first time. Forty-eight core service units participated in this survey administration, an increase from 37 core services from 2007. The eleven new core services are indicated with (1).

<b>Finance Units</b>	<b>MAIS units (including ITSS)</b>	
1 Financial Operations -Accounting Services	21 MAIS Student Administration Application Support	33 OSEH-RSS: (Radiation Safety Service)
2 Financial Operations -Sponsored Programs	22 MAIS Human Resource Mgmt System Application Support	34 OSEH Fire Safety Services (1)
3 Financial Operations -Payroll	23 MAIS Financial & University Development Application Support	35 OSEH Ergonomics (1)
4 Procurement- Procurement	24 MAIS Access Services	36 University Fleet and Garage Services (1)
5 Procurement- Contract Management	25 MAIS User Communication, Documentation & Training Support	37 University Parking Services
6 Property Disposition	26 MAIS Help Desk Support	38 University Transit Services
7 Space Analysis	27 MAIS Research Application Support	39 Department of Public Safety
8 Procurement- Accounts Payable	28 Information Technology Security Services (ITSS)	40 Architecture, Engineering & Construction (AEC) (1)
9 Work Connections	29 MAIS Business Intelligence Support (1)	41 Plant Operations-Custodial Services
10 Risk Management	30 MAIS University Development Application Support (1)	42 Plant Operations-Construction Services
11 Mail Services	31 MAIS Document Imaging Services (1)	43 Plant Operations-Facilities Maintenance
12 Financial Analysis (1)	<b>Facilities and Operations Units</b>	44 Plant Operations-University Grounds
<b>University Human Resources Units</b>	32 OSEH-B&LS: (Biological & Laboratory Safety)	45 Plant Operations-Moving & Trucking (1)
13 Office of Institutional Equity		46 Plant Operations-Call Center (1)
14 Staff HR Services		47 Plant Operations-Utilities & Plant Engineering (1)
15 Organizational Development and Training		48 Plant Payroll/Accounts Payable Office (internal B&F only) (1)
16 Records and Information Services		
17 Faculty & Staff Assistance Program		
18 Work Life Resource Center		
19 Academic HR		
20 Child Care Centers		

*Note: PTS-University Fleet and Garage Services and Plant Operations-Building Services conducted special off-cycle B&F Customer Satisfaction surveys in 2008. This data is resident in the 2009 CSA 2.0 reporting tool as 2007 "off-cycle".*

## SURVEY ADMINISTRATION: TARGETED CUSTOMER ACCESS TO SURVEYS

Each core service unit was encouraged to develop a list of knowledgeable customers to whom to target their surveys. This could include groups like BAG, APADG (Associate Provost/Associate Dean Group), FUN, UMHS Administrators, P-Card users, etc. We encouraged customers to forward surveys to others they knew were knowledgeable about our services. To increase response rates and at the request of the team, a few managers personally solicited input directly from customer groups mid-cycle.

We gave all survey takers the added option to complete as many additional surveys as they would like.

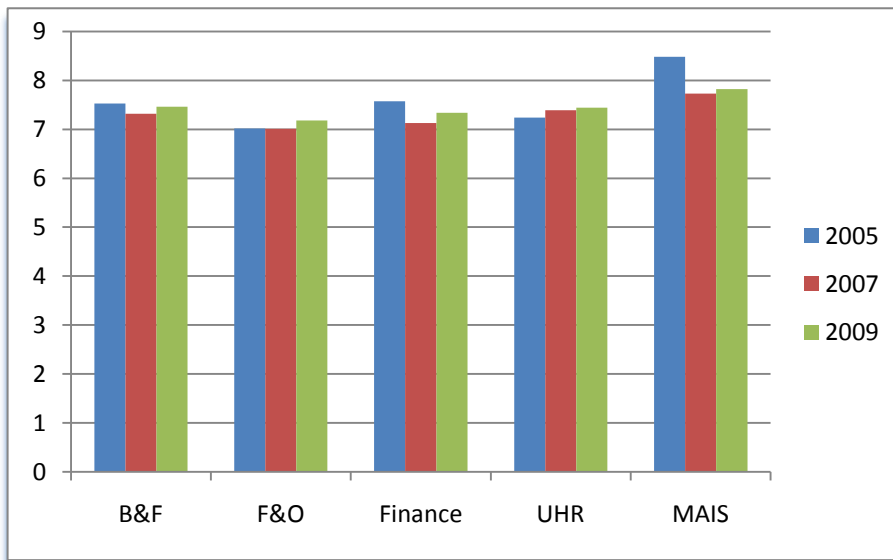
Finally, surveys were distributed to customers in clustered groups of 5-6 core services. We used a survey administration technique (skip logic) that allowed customers to easily skip past units about which they had no knowledge or feedback.

### III. B&F RESULTS AND COMPARISONS 2005 – 2007--2009

#### OVERALL SATISFACTION

In 2008, as a measure of our Provider of Choice goal, Business and Finance Senior Staff set a target of maintaining or improving the B&F Overall Satisfaction score in 2009. This target was achieved, as the Overall Satisfaction score that was reported in 2007 was 7.32 on a 10 point scale and most recently in 2009 the overall satisfaction score was 7.46. This is a statistically significant improvement. In addition, all but two of the 37 units who collected data in both 2007 and 2009 achieved the target of maintaining or improving their overall satisfaction score.

OVERALL SATISFACTION



*The 2005 B&F Customer Survey included significantly fewer responses and three service attributes which were dropped in 2007. Thus for most units, and particularly those with small response rates, 2005 does not serve as a valid benchmark.*

CHART DETAIL

OVERALL SATISFACTION RATING BY B&F AREA	2005	2007	2009	Diff 2007-2009
<b>B&amp;F OVERALL SATISFACTION SCORE</b>	<b>7.53</b>	<b>7.32</b>	<b>7.46</b>	↑ <b>*.14</b>
FACILITIES & OPERATIONS	7.02	7.01	7.18	↑ .17
<b>FINANCE</b>	<b>7.57</b>	<b>7.13</b>	<b>7.34</b>	↑ <b>*.24</b>
UHR	7.24	7.39	7.44	↑ .05
MAIS	8.48	7.73	7.82	↑ .09
<i>B&amp;F Overall % Satisfied (rating of 8, 9, 10)</i>	60.0%	56.0%	58.6%	↑ 4.0
<i>B&amp;F Overall &amp; Dissatisfied (rating of 1, 2, 3)</i>	6.1%	7.1%	7.1%	0.0
<b>Total Responses</b>	3,464	6,085	11,526	↑ +5,441

\*The increases in B&F Overall and Finance Overall scores from 2007 to 2009 were statistically significant. A statistically significant difference is also indicated in red.

### RESPONSE RATE BROKEN OUT BY AVP AREA

11,526 individual surveys were completed (an increase of 88% from 2007).

Total Responses by AVP Area	2005	% of Total	2007	% of Total	2009	% of Total
B&F Overall	3,464	100%	6,085	100%	11,526	100%
Facilities & Operations	868	25%	1,157	19%	3,251	28%
Finance	1,521	44%	2,411	40%	2,512	22%
University Human Resources	512	15%	740	12%	1,942	17%
MAIS	563	16%	1,777	29%	3,821	33%

### B&F OVERALL SERVICE ATTRIBUTE RATINGS 2005 TO 2009

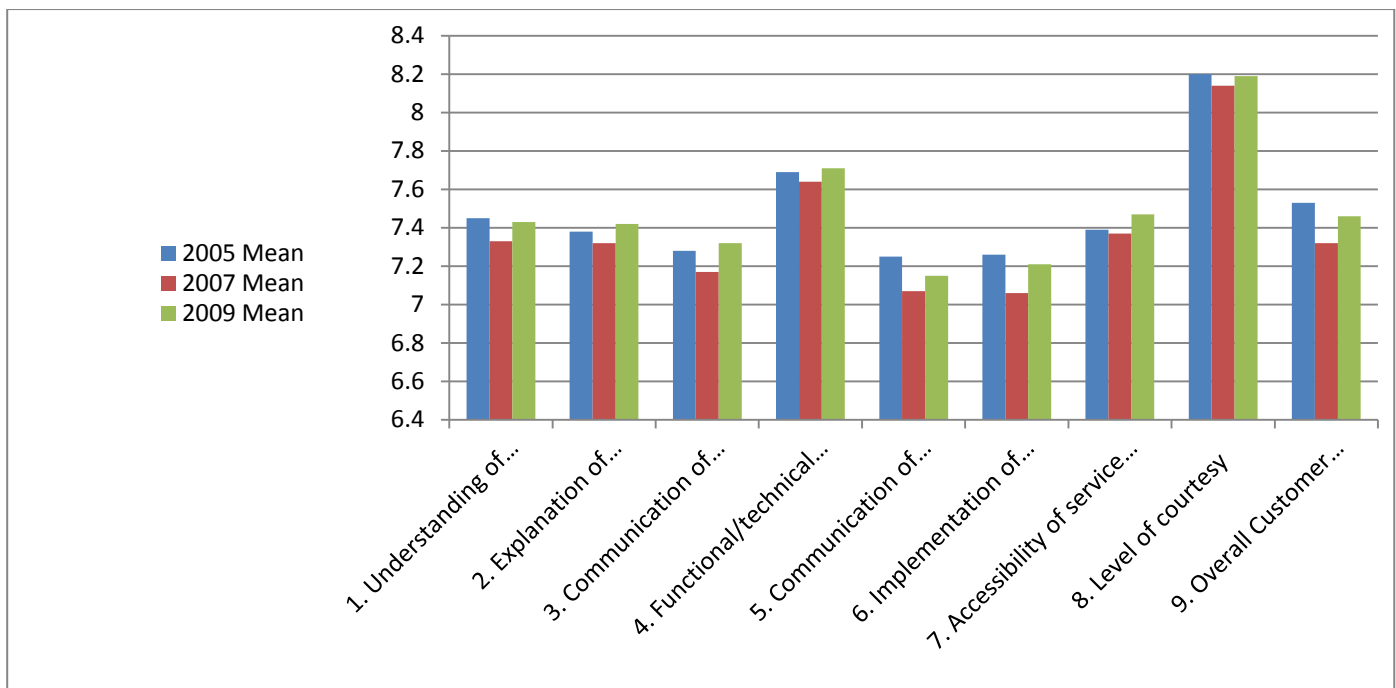


CHART DETAIL

B&F SERVICE ATTRIBUTE RATINGS	2005 Mean	2007 Mean	2009 Mean	Diff 2007-2009
1 Understanding of customer's business needs	7.45	7.33	7.43	↑ *0.10
2 Explanation of University policies and procedures	7.38	7.32	7.42	↑ *0.10
3 Communication of service standards	7.28	7.17	7.32	↑ *0.15
4 Functional/technical expertise	7.69	7.64	7.71	↑ 0.07
5 Communication of service changes	7.25	7.07	7.15	↑ 0.08
6 Implementation of service changes	7.26	7.06	7.21	↑ *0.15
7 Accessibility of service and/or service provider	7.39	7.37	7.47	↑ 0.10
8 Level of courtesy	8.20	8.14	8.19	↑ 0.05
<b>9 Overall Customer Satisfaction</b>	<b>7.53</b>	<b>7.32</b>	<b>7.46</b>	<b>↑ *0.14</b>

\*Indicates statistically significant difference at p<.05 A statistically significant difference is also indicated in red.

## CUSTOMER SEGMENTS – OVERALL SATISFACTION RATING MEAN SCORES

SATISFACTION RATING	2005	RATING	2007	RATING	2009	RATING
<b>Total Responses by Customer Type</b>	2,464	7.53	6,121	7.32	11,526	*7.46
Academic Units	1,617	7.48	2,530	7.29	3,542	*7.56
Div Student Affairs	173	7.46	332	7.54	502	7.40
UM Health System	835	7.46	1,065	7.41	1,994	7.53
Central Admin Users/Other	649	7.86	544	7.23	2,269	7.59
Business & Finance Employees	(Central Admin)	-	1,614	7.27	1,109	*7.47
Unreported	-	-	-	-	2,110	7.09

## SPECIAL DETAIL: CUSTOMER SEGMENTS – MEAN SCORES – ACADEMIC UNITS ONLY

Service Attribute Ratings Academic Units Only	2005 Mean	2007 Mean	2009 Mean	Diff from 2007
1 Understanding of customer's business needs	7.43	7.31	7.53	*0.22
2 Explanation of University policies and procedures	7.30	7.33	7.53	*0.20
3 Communication of service standards	7.21	7.16	7.46	*0.30
4 Functional/technical expertise	7.64	7.66	7.83	*0.17
5 Communication of service changes	7.15	7.10	7.28	*0.18
6 Implementation of service changes	7.17	7.08	7.32	0.24
7 Accessibility of service and/or service provider	7.37	7.38	7.63	*0.25
8 Level of courtesy	7.21	7.20	8.37	*0.17
<b>9 Overall Customer Satisfaction</b>	<b>7.48</b>	<b>7.28</b>	<b>7.56</b>	<b>*0.27</b>

\*Indicates statistically significant difference at  $p < .05$  A statistically significant difference is also indicated in red.

## IV. CONTINUE % NEUTRAL, % SATISFIED, % DISSATISFIED

The mean satisfaction score is a precise statistical measure that considers the entire distribution of scores and thus is the most statistically reliable measure. However, it is possible to have an increase in the mean score, with a decrease in the “% Satisfied” depending on the distribution of responses. Therefore, Sibson Segal Consulting recommends also analyzing the direction of both “% Dissatisfied” and “% Satisfied” scores to further gauge organizational health and customer satisfaction. Additionally, their experience suggests stakeholders more easily understand “% Satisfied” than mean scores.

Aaron Sorenson, the Sibson Segal consultant who worked with us to develop the initial customer survey, and who recently completed his PhD thesis on customer satisfaction methods, also states: “Achieving a 70% satisfied score is a reasonable standard as an indicator of organizational health. The rationale behind this standard is that when satisfaction dips below 70%, focus groups can usually clearly identify specific areas for qualitative improvement initiatives. If satisfaction is above 70%, focus groups have difficulty pinpointing qualitative improvement initiatives, thus strategic improvement is blurred.”

## 2009 B&amp;F DATA SHOWS A GENERAL INCREASE IN % SATISFIED

B&F Overall has a 58.6% satisfaction rating (up from the 2007 score of 58.1%)

F&O: 51.5% to 54.1%

MAIS: 63.6% to 65.3%

Finance: 52.5% to 58.2%

UHR: 58.6% to 58.2%

## **V. MOVING FORWARD**

### **ROLLING OUT THE 2009 DATA**

The B&F Customer Satisfaction Survey team is currently analyzing the customer survey data as well as the implications of the survey administration changes we implemented, and preparing for unit presentations.

Our next steps include:

- Encouraging celebrations for the large number of units who met or exceeded the target
- Sharing detailed data results with directors and senior unit leaders during June/July
- Summary and presentation of the open-ended survey comments
- Presentation of the updated CSA tool (moved to SQL database) with 2005, 2007 and 2009 data

### **SPECIAL THANKS TO THE 2009 B&F CUSTOMER SATISFACTION ADVISORY TEAM**

Thanks to the B&F Customer Satisfaction Advisory Team for their advice and support (which included forwarding survey links to their colleagues). Their support has been invaluable.

Members include:

- Susan Campos - Rackham Graduate School
- Susan Monroe - Literature, Science & Arts
- Marti Moon - Atmospheric, Oceanic & Space Sciences
- Lara Nelson - School of Natural Resources & Environment
- Jody Reynolds - Institute for Social Research
- Patrick Smitowski - Literature, Science & Arts
- Candace Terhune-Flannery - School of Social Work
- Kathleen Thomson - Institute for Social Research

### **TEAM OBSERVATIONS-LOOKING TOWARDS 2011**

- Continue with the B&F Customer Satisfaction Advisory Team and with a mixture of old and new members
- Investigate the self administration of the SQL reporting tool (CSA 2.0)
- Investigate Qualtrics as a survey tool
- As much as possible, continue with the same team members on the B&F Customer Satisfaction Advisory Team

CSA 2.0 Tool Web Address: <http://av-it-csrsurvey/CSA2/Main.aspx>