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FUTURE WITHOUT BOUNDARIES℠

CASBO San Diego/Imperial Annual Section Conference

DESIGN AN EFFECTIVE SURVEY TO EVALUATE THE SUCCESS OF YOUR PROJECT

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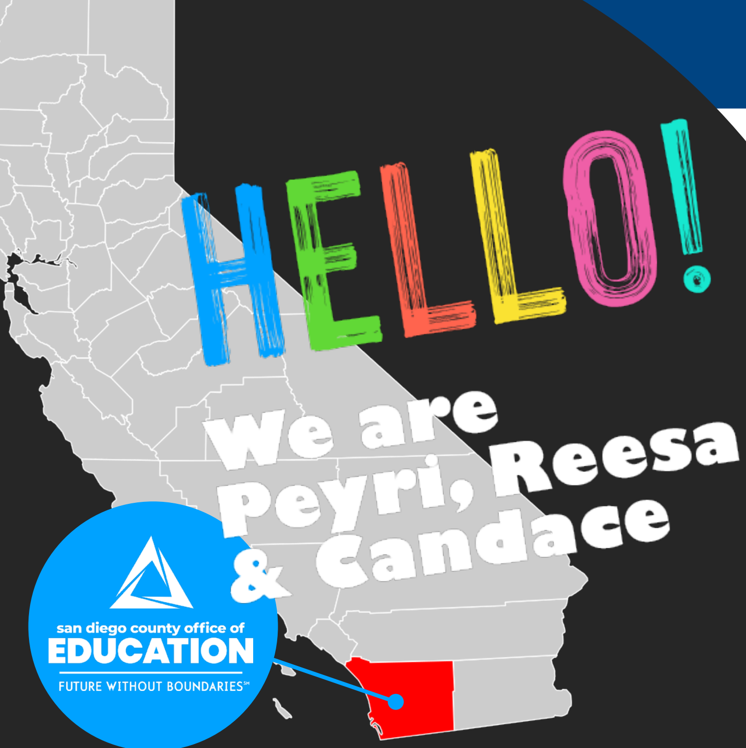
EPMO

SDCOE Enterprise Project Management Office (EPMO) | Feb. 24, 2022



- SDCOE
- Integrated Technology Services
- Enterprise Project Management Office (EPMO)

Types of audiences we've surveyed to evaluate projects:

5-20 employees	Project team members
About 115 employees	Our own division
About 1600 employees	Our entire organization
Districts and charter schools	Our customers

Chat Activity

Think back to a "bad survey" that you took.

What was something that made it bad?

Chat Activity

Now think of one of your projects where you might use a survey to measure its success.

Type your project's name.

About This Session

Survey Basics

- “Begin with the end in mind”
- Quantitative vs Qualitative
- Types of Questions
- EPMO Tips
- Best Practices
- What to do with your survey results

EPMO’s Survey Template

- Explanation of the generic Word template
- Walk-thru of a completed template

Wrap Up

- Takeaways
- Q&A

"Begin with the end in mind…"

The outcome of the project is to reduce the requests that come in "through the side door" (direct emails, phone calls, chats, and walk-ins to CSS and other ITS staff); instead they will be entered in ServiceNow.

Scope
Who/how many this will impact? What is included (or not included) that can help manage the expectations?
This effort will impact all SDCOE employees who request services and/or need help resolving technical issues. Because Executive Assistants, Administrative Assistants, and Program Secretaries often assist others by entering tickets on their behalf, we will work closely with that audience.

This project is not intended to educate PeopleSoft or SIS customers.

This project is for educating employees on ServiceNow as it exists in March 2021 – no ServiceNow development or changes are needed for this project.

Objectives/Success Criteria
How will you know if the project was a success? List what you are trying to accomplish and the success criteria.
At the completion of the project:
- All SDCOE employees, and especially the Executive Assistants, Administrative Assistants, and Program Secretaries, will know the expected procedure for requesting tech support
- The new job aid and video will be clear, concise, and easy to use
- More SDCOE employees will know how to access ServiceNow and correctly enter a ticket (when they need to)
- There will be a decrease in the number of emails, phone calls, chats, and walk-ins asking for assistance from CSS
- New employees will have exposure to ServiceNow at orientation/onboarding (like simply logging in to ServiceNow)

Find out using a survey

Goals Alignment
With which Board Goals and ITS Goals does this project align?

☐ #B1 Connect the educational experience to the world of work
☐ #B2 Provide educational opportunities and supports to SDCOE schools and school districts
☒ #ITS1 Maximize Customer Success
☐ #ITS2 Deliver Value: Applications & Systems

Do you now have **clarity on how to submit a ticket**, including how to differentiate a Request from an Issue?

YES - I learned something new!

To what extent do you agree the new 5-minute **INSTRUCTIONAL VIDEO** is clear, concise, and easy to follow?

4 - Strongly Agree (BEST)

YES - I learned something new!

Do you now **know the expected procedure** for requesting tech support using ServiceNow (and to not directly contact a Help Desk team member)?

3 - Agree

To what extent do you agree the new **JOB AID** is clear, concise, and easy to follow?

Quantitative Questions

Scaled, "closed ended", measurable, provides stats

If you **learned something new or had a specific takeaway**, would you please tell us what that was?

"I never knew that everyone already has a login!"

Have you **shared the resources with others**? If so, please share a few details (how many people, feedback received, etc.)

"I shared the materials with my entire department of 20"

"Informative, useful"

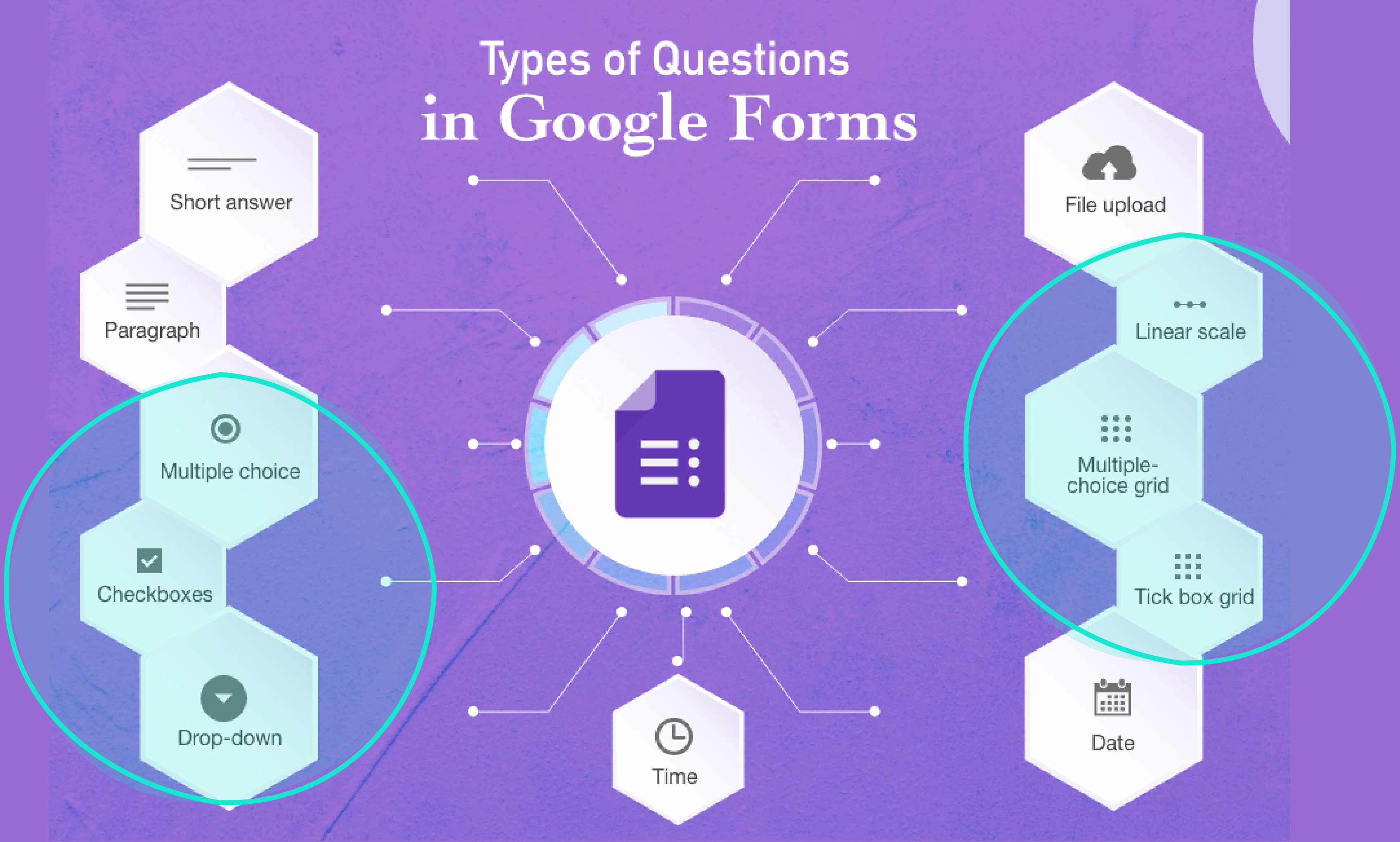
What **2 adjectives** would you use to describe the training meeting?

"Please have future meetings!"

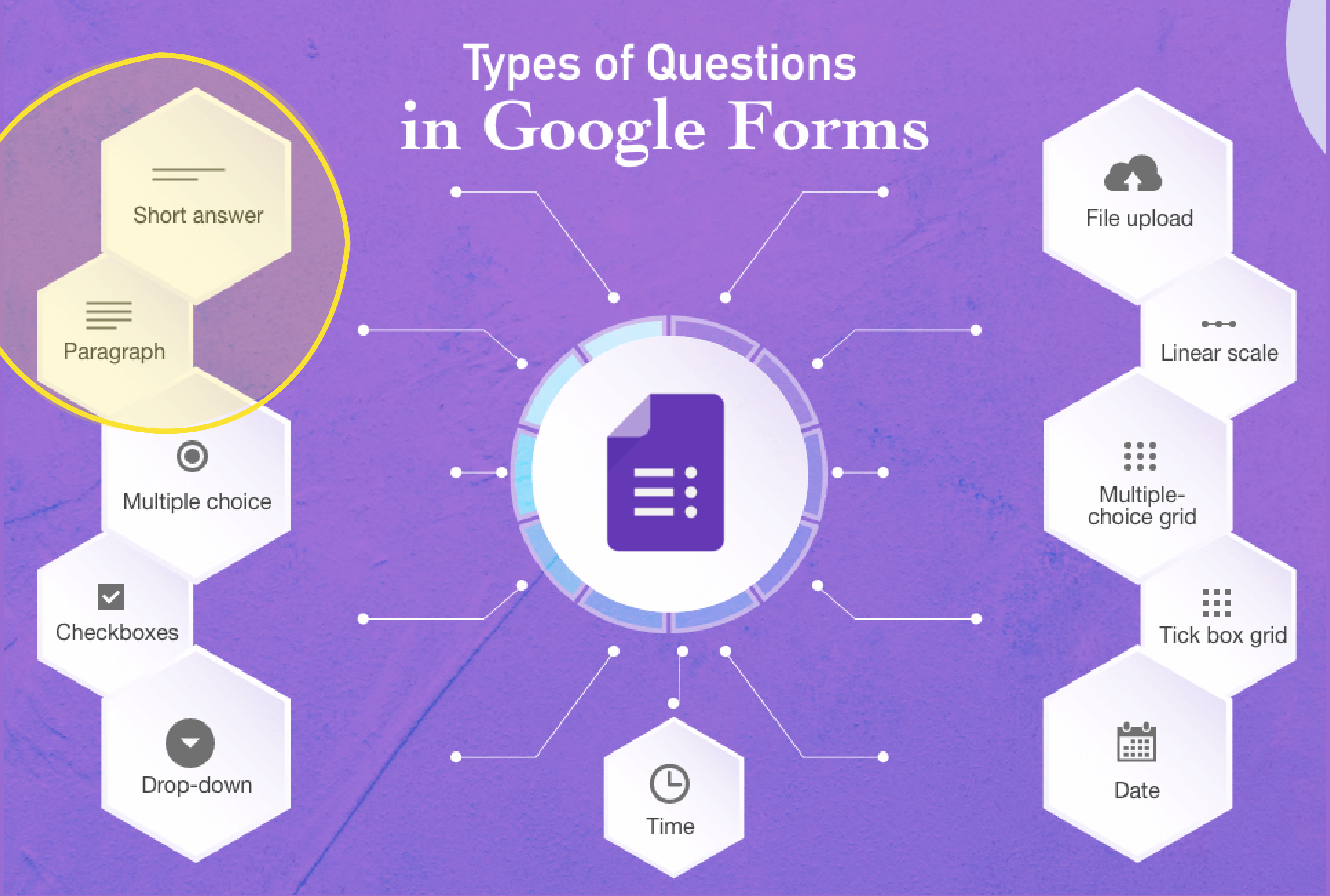
Do you have any **additional comments** or feedback you would like to provide?

Qualitative Questions

"Open ended", text boxes, provides insight and details



How to Create and Use Google Forms https://www.appypie.com/create-google-forms



How to Create and Use Google Forms https://www.appypie.com/create-google-forms

EPMO Survey Tips

Google Forms or Microsoft Forms are great options (FREE)

- Included in your Google Suite or Office365 (no additional cost or license)
- Works for internal and external surveys

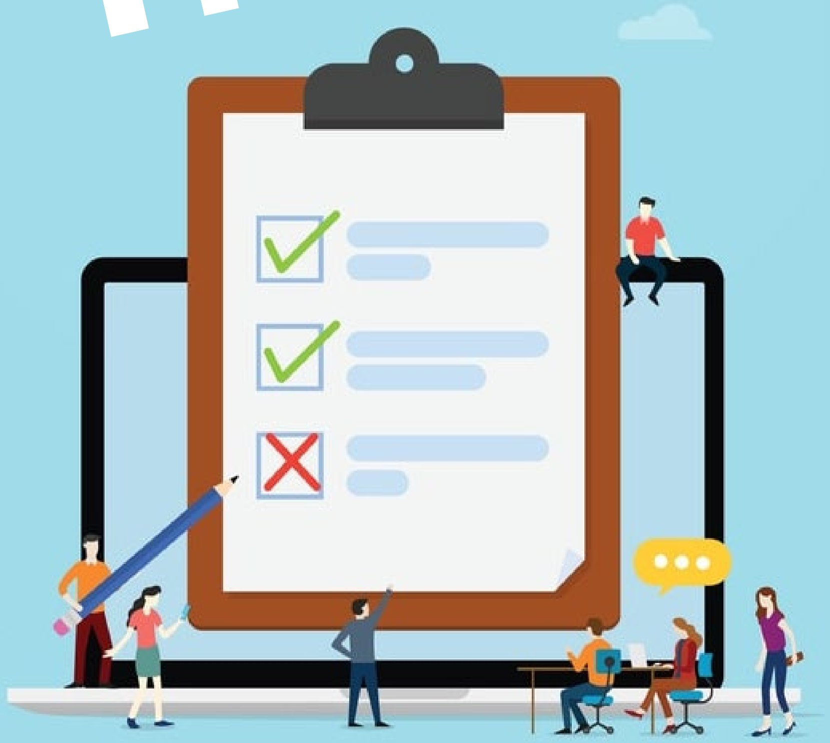
Anonymous or not?

- On a case by case basis, we evaluate whether the survey should record names, or if it should be anonymous

Design "on paper" first

- We use a Survey Template (Word doc)
- Easily share the document for review
- It becomes a project artifact
- For future projects that are similar, you can duplicate then edit a previously created Word doc

Best Practices



1. Define a clear, attainable goal for your survey.
2. Don’t let your survey get too long.
3. Don’t ask leading questions.
   “Do you love our amazing support team?”
4. Stay away from asking double-barreled questions.
   “How would you rate the quality of our product and support?”
5. Keep the more personal questions to the end.
6. Preview and test your survey before you send it.

Sources: Qualtrics, Pew Research, Survey Monkey

Chat Activity

Congratulations…
You deployed a survey and people responded!

What do you think you should *do* with the survey results?

We have a template!

Sections:

1. Survey Links
2. Survey Name
3. Opening Text
4. Questions
5. Thank You Message
6. Settings *(varies by software)*

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[Insert Project Name] Survey Questions

Survey Link for Participants to Respond:
[Insert Link]

Survey Link for Owners to Edit/View Responses:
[Insert Link]

Survey Name:
[Insert Project Name] Survey

Opening Text:

PURPOSE: The ITS division is interested in hearing your feedback about the [Insert Project Name], [Insert Purpose of Project]. How did we do? Your input will help us improve our service and future projects.

SURVEY TIMEFRAME: [Insert Date Range]

CONTACT: Please contact [Insert Name] ([Insert Email Address]) with any questions about this survey.

Questions:
* = Required

- ***Q1. Which division are you in? [DROP-DOWN]**
  - Administration
  - Business Services
  - Human Resource Services
  - Innovation
  - Integrated Technology Services
  - Learning and Leadership Services
  - Student Services and Programs
- ***Q2. Which training opportunities did you participate in between [Insert Start Month] and [Insert End Month]? *(Mark all that apply)* [MULTIPLE CHOICE]**
  - One-hour online live training in [Insert Month] to learn the basics
  - One-hour online live training in [Insert Month] to learn tips and tricks
  - Self-Study – Read a job aid
  - Self-Study – Watched a recorded video
  - COMET workshop in [Insert Month] to learn about the project rollout
  - Other ___________________
  - None of these

Survey link to email or publish

Survey link for Owners only –
DO NOT EMAIL THIS LINK!

Survey Name

- Seen at the top of the screen when people take the survey

Opening Text

- Purpose, timeframe, contact info
- Displayed at the top of your survey
- You can include it in your email message

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  - None of these

Survey Questions

- Write your survey questions, the item type, and the choices
- **Multiple Choice** – if 4 or fewer choices, generally present as radio buttons; for longer lists, use dropdown
- **Likert Scale (on a scale of 1-4, for example…)** – consider how/if you will use “Neutral” as a value; use N/A if there is a chance the question won’t pertain to the respondent
- **Text Box** – for open-ended responses
- **Required?** – Identify which questions are required versus optional; you might want to label the item “OPTIONAL” for the optional ones

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  - Other ________________
  - None of these

Thank You Message

- Displayed on screen after the person submits their survey

Settings

- Review the settings, take a screenshot
- For internal surveys, use “Only people in my organization can respond and turn on “Record name” (if it’s not anonymous) and “One response per person”
- IMPORTANT: If this is for people outside of SDCOE, make sure you set it to “Anyone can respond” – you might want/need to add Name/Organization questions
- If it’s important to close (lock) your survey, set an end date and time

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Thank You Message (Upon Submit):

Thank you for providing us your feedback about the [Insert Project Name]. All responses will be reviewed by our project team. Your input will help us improve our service and future projects. If you have any questions about this survey, please contact [Insert Project Manager’s Name], [Insert Project Manager’s Job Title], [Insert Department Name].

Settings (Adjust As Needed):

Who can fill out this form

- ( ) Anyone can respond
- (•) Only people in my organization can respond
  - [x] Record name
  - [x] One response per person
- ( ) Specific people in my organization can respond

[x] Customize thank you message

Thank you for providing us your feedback about the Unified Communications (Microsoft Teams) Project. All responses will be reviewed by our project team. Your input will help us improve our service and future projects. If you have any questions about this survey, please contact Peyri Herrera, Sr. Director, Enterprise Project Management Office (EPMO).

Response receipts

- [x] Allow receipt of responses after submission
- [ ] Get email notification of each response

"Begin with the end in mind…" When you are planning your project, identify your objectives and success criteria

A survey can help you gather feedback that is *quantitative* and *qualitative*

Design your survey "on paper" first - we have a Word template

Incorporate survey best practices (Qualtrics, Pew Research, Survey Monkey)

Qualtrics - Tips for building effective surveys
https://www.qualtrics.com/blog/10-tips-for-building-effective-surveys

Pew Research Center - Questionnaire Design
https://www.pewresearch.org/methods/u-s-survey-research/questionnaire-design

SurveyMonkey - Surveys 101
https://www.surveymonkey.com/mp/survey-guidelines

Thank you!

Design An Effective Survey
to Evaluate the Success of Your Project

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