Tackling Risk Through Customer Satisfaction

Presented by:
Angela Song and Margo Simpson
Introductions

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Director of Organization & Performance Assessment (Operational Strategic Initiatives – Bus Affairs)

Margo Simpson – IBM
Managing Consultant (Strategy and Analytics – Finance and Risk)
Agenda

• UCSD’s Challenge
• Why ERMIS?
• Survey and Dashboard Methodology
• Case Study: Health Sciences “We Heard You” Campaign
• Group Exercise: Procurements Specialized Outreach
UCSD’s Challenge

Cumbersome and manual data compilation, statistical analysis and report generation

Two qualified individuals to complete work for thousands of report requests

Only able to accommodate some departments due to limited capabilities

Campus demand for the reports was growing; Angela and her team saw that the current process was not sustainable
UC ERMIS Solution

• Automate the data load process
• Embed statistical analysis via SPSS software
• Generate dashboards with drill-down capabilities and actionable insight at the push of a button
Customer Satisfaction (CSS) Dashboard

Surveys UCSD faculty and staff on customer satisfaction related to various campus services (Dining Services, Facilities Management, Parking, etc.)
Staff@Work Dashboard

Surveys UCSD employees to gauge their satisfaction related to the leadership, their department, their supervisor and their personal experience.
UCSD Balanced Scorecard

• UCSD was the first university in the nation to adopt the Balanced Scorecard in 1993 and to be inducted into the Balanced Scorecard Hall of Fame in 2003

• Four Facets of the Balanced Scorecard:
  – Financial/Stakeholder
  – Internal Process
  – **Innovation & Growth** – Staff@Work Dashboard
  – **Customer** – CSS Dashboard
Methodology – Design Customer Sat Survey

- Designed with social science research

- Standard set of 7 questions for all services with up to 11 customized questions per service
  - Standardization allows for comparisons across services and year-on-year trending analysis
  1. Understands my needs
  2. Accessible
  3. Responsive
  4. Resolve issues
  5. Knowledgeable/professional/court eous etc.
  6. Effective use of Blink (information sharing website)
  7. Moving in a positive direction

- Participation Rate
  - Consistently 36-46% among services
Methodology – Design Staff@Work Survey

- Designed with social science research and tested for internal reliability

- Reflects four factors or dimensions:
  - Leadership
  - Department
  - Supervisor
  - Employee Effectiveness

- Same set of questions for 17 years

- Ultimate goal:
  - Are you a satisfied UCSD employee? Would you recommend others to work here?
  - Regression analysis to predict what drives this outcome

- Participation Rate
  - 96% for some areas, 53% overall
Methodology – Gather Survey Data

Customer Satisfaction Survey

**Data Load**
- Data is loaded from survey into SQL server

**File Generation**
- SQL Server Reporting Services (SSRS) generates exports as Excel files

**Data Review**
- UCSD programmers review files for data accuracy and formatting

**File Delivery**
- Files are provided to IBM via file transfer (FTP)
Methodology – Gather Survey Data

Staff@Work Survey

Data Review
• Internal review and finalization of survey data and in-house reports

Data Load
• ETL (Extraction Transformation and Loading) processes are run against data from UCSD’s internal data warehouse

File Generation
• Via ETL processes, numerous .csv files are generated in a format agreed upon between UCSD and IBM

File Delivery
• Files are provided to IBM via file transfer (FTP)
Methodology – Develop Dashboards

- **Plan & Mobilize** – Stakeholder Expectations, Scheduling, etc.
- **Discovery** – Requirements Gathering, Data Discovery
- **Iterative Design & Development** – Develop, Demo to Client, Repeat
- **User Acceptance Testing** – End users test the reports based on requirements
- **Deployment & Close Out** – Training as necessary, User Guide Development, End User Communication
Case Study: “We Heard You” Campaign

Risk Scenario: Based on FY13 Staff@Work survey results, Health Sciences Development identified 12 opportunities for improvement.

Data-Driven Action Taken: Sr. Leadership Team developed and executed comprehensive strategies to address each opportunity under the “We Heard You” campaign.

Outcome: FY14 survey results revealed significant score improvements AND the largest fundraising year for Health Sciences in the history of UC San Diego!
Case Study: Areas of Opportunity

2013 : n/N = 16/ 26 (62%)
Mean Average = 3.73
Correlation Coefficient Average = 0.42
Case Study: Areas of Opportunity

Correlation Coefficient – strength of a linear relationship between an attribute and Overall Satisfaction (-1 to +1. Weak: 0.1, Moderate: 0.3, Strong: 0.5) Higher the coefficient, stronger the relationship between the attribute and Overall Satisfaction. Correlation between two variables does not necessarily imply any casual relationship.
Case Study: Data-Driven Action

The Senior Leadership Team worked together to develop comprehensive strategies that addressed each of the identified areas.

These strategies were branded under the theme “We Heard You.”

Over the past year, the Senior Leadership Team executed each strategy while periodically reminding the entire department that “We Heard You.”
Case Study: Outcomes
## Case Study: Outcomes

### HEALTH SCIENCES DEVELOPMENT Staff@Work Survey Mean Score Trend Analysis, 2010 to 2014

<table>
<thead>
<tr>
<th>Department</th>
<th>2010</th>
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<th>2013</th>
<th>2014</th>
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## Case Study: Outcomes

### HEALTH SCIENCES DEVELOPMENT

**Staff@Work Survey Analysis, 2010 - 2014**

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<th></th>
<th>2013</th>
<th>2014</th>
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<tr>
<td>Response</td>
<td>62%</td>
<td>76%</td>
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<td>Average Mean Score</td>
<td>3.72</td>
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This year, of the 53 attribute mean scores:
- 45 are in the excellent range (>3.8)
- **42** increased from the previous year
- 2 decreased from the previous year

**Primary Opportunities:**
- 16 Improves Services/Products
- 5 Recommendations Without Fear
- 21 Participate in Decisions

(see page 3 for more details)
Case Study: Outcomes

• Quote from the Sr. Executive Director of Health Sciences Development:
  – “While we know our work is not complete, the Staff@Work survey has provided a roadmap to help guide our entire team toward improved results, least of which is accomplishing the largest fundraising year for Health Sciences in the history of UC San Diego.”
Group Exercise: Procurements Specialized Outreach

• Risk Scenario:
  – UCSD Procurements received their annual Customer Satisfaction Survey results for FY12 and noticed that there were certain departments that were consistently rating Procurements low in the same areas.

• For the following two slides, we will break into groups and try to identify those opportunities for improvement.
Group Exercise: Can you identify the areas of opportunity?
**Group Exercise: Can you identify the areas of opportunity?**

**Satisfaction Ratings (Mean Scores) by Vice Chancellor Unit, All Respondents**

<table>
<thead>
<tr>
<th>VCU</th>
<th>N of Responses</th>
<th>Overall</th>
<th>Understand</th>
<th>Accessible</th>
<th>Responsive</th>
<th>Collaborative</th>
<th>Resolve</th>
<th>Courteous</th>
<th>Blink</th>
<th>PosDir</th>
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<tr>
<td>Total</td>
<td>292</td>
<td>3.6</td>
<td>3.7</td>
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<td>3.6</td>
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<td>Academic Staff</td>
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<td>Academic Affairs</td>
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<td>3.8</td>
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<td>Marine Sciences</td>
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<td>Health Sciences</td>
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<td>Ext &amp; Bus Afrs</td>
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**Mean Score:**
- **Low < 3.0**
- **Marginal >= 3.0**
- **Good > 3.5**
- **Excellent > 3.8**

**Academic Staff:** Academic Affairs, Marine Sciences, Health Sciences

**Administrative Staff:** External & Business Affairs, Student Affairs, Resource Management & Planning, Chancellor’s Unit

Faculty surveyed only every other year (2011, 2013, etc.)
Group Exercise: What should Procurements do?

Let’s take a few minutes to brainstorm potential risk intervention strategies that Procurements could employ.
Group Exercise: What DID Procurements do?

Implemented Department Based Reviews (DBRs)

- Based on Customer Satisfaction Survey results, identified areas that gave them low ratings
- Created specialized outreach with customized brochures and individualized meetings
Group Exercise: What DID Procurements do?

- Analyze customer satisfaction surveys and target depts. who scored us below a 3
- Schedule meetings w/each dept.
- Schedule key depts. Just before survey invitation goes out
- Email dept. for any outstanding issues before DBR
- Match functional areas of Procurement with dept. (3 to 4 people)
- Work w/Analytics to identify meaningful metrics
- Meet with team beforehand to review data, validate metrics, and address issues posed by dept.
- Conduct meeting at dept. location
- Follow-up with any action items
**Group Exercise: Let’s Analyze the Results!**

**DBR Departments:**
- 11% average **increase**
  - 2012 DBR: 3.33
  - 2013 DBR: 3.70

**Non-DBR Departments:**
- 1% average **decrease**
  - 2012 Non-DBR: 3.71
  - 2013 Non-DBR: 3.67
Group Exercise: Let’s Analyze the Results!

2012 Results

Strengths and Areas of Opportunity

2013 Results

Strengths and Areas of Opportunity

Scattergraph of all questions correlated to Overall Satisfaction
Mean Average = 3.66, Correlation Coefficient Average = 0.88
Correlation Coefficient - Weak: 0.1, Moderate: 0.3, Strong: 0.5

2013 Scattergraph of all questions correlated to Overall Satisfaction
Mean Average = 3.71, Correlation Coefficient Average = 0.89
Correlation Coefficient - Weak: 0.1, Moderate: 0.3, Strong: 0.5
### Group Exercise: Let’s Analyze the Results!

#### 2012 Results

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<thead>
<tr>
<th>VCU</th>
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So, how does this all fit into Performance and Risk Management?

**Balanced Scorecard**
- Customer Satisfaction and Staff@Work dashboards and report are key inputs into the Balanced Scorecard

**Strategic Planning**
- The automation of these dashboards allows UCSD to serve all campus areas to help them make data-driven decisions regarding strategies and outreach

**Reputational Risk**
- Knowing how employees are feeling and if they are feeling valued/undervalued can correlate to turn-over/mental health/stress issues, etc.
- Will our employees promote our campus to others as a place to work?
Questions?