OIX Meeting
October 22, 2014
FINANCE – Customer Service Survey

• Easy: Conducted through Survey Monkey with user friendly format

• Brief: 5-6 questions
  • Goal: Not to be time-consuming

• Relevant: Focus on customer service in the last 12 months

• High-level: Broad evaluation subjects:
  • Timely responses
  • Professional and effective responses
  • How well is staff trained and informed
  • Needs for training by Finance
  • Online tools / Website
FINANCE – Customer Service Survey

• All-Inclusive: Includes all areas under Finance (survey to provide definitions of area functions)
  • Accounts Payable
  • Payroll
  • Budget, Planning, & Analysis
  • Grants Accounting
  • Student Accounts (Bursar)
  • Auxiliary Services
  • Supply Chain Management
  • Treasury/Bursar
FINANCE – Customer Service Survey

• **Goals**
  • To get constructive feedback in a positive manner
  • Gauge how we are serving our customers
  • Determine areas where improvement is needed
  • Identify potential ideas and opportunities
  • Positive feedback is welcomed

• **Do not want:**
  • Personal attacks
    • Certain issues with individuals should be communicated to the appropriate supervisor.
    • Penalized for past performance (beyond 1 year)

• Business Manager Group as first phase
  • Second phase to larger University community

• Follow-up surveys to target key areas identified by this survey