

CUSTOMER SATISFACTION SURVEY

BUDGET OFFICE

2018/19

Facilitate campus budget planning, development, administration and mid-year review processes. Support data warehouse reporting, labor cost distribution and assist with ad-hoc financial analytics.



3.95
OVERALL SATISFACTION WITH
BUDGET OFFICE



60
RESPONDENTS



22
NET PROMOTER SCORE



3.80
MOVING IN A POSITIVE DIRECTION
TO MEET CUSTOMER NEEDS

STRENGTHS & OPPORTUNITIES

STRENGTHS

Accessible to Customers
Provides Effective Advice, Guidance
Facilitates Problem Resolution

OPPORTUNITIES FOR IMPROVEMENT

Understands My Needs and Requirements
Responds to Requests Within an Acceptable Time
Moving in a Positive Direction

SURVEY ITEMS

3.86

UNDERSTANDS
CUSTOMER NEEDS

4.04

ACCESSIBLE TO
CUSTOMERS

3.89

RESPONSIVE TO
REQUESTS

3.96

PROVIDES EFFECTIVE
ADVICE & GUIDANCE

3.96

RESOLVES PROBLEMS
EFFECTIVELY

4.02

KNOWLEDGEABLE STAFF

4.09

HELPFUL STAFF

3.75

EFFECTIVELY USES
WEBSITE

Below 3.0: Low
3.00-3.59: Marginal

3.60 - 4.29: Good
4.30 & above: Excellent



2019 CSU San Marcos CSS

Budget Office

Facilitate campus budget planning, development, administration and mid-year review processes. Support data warehouse reporting, labor cost distribution and assist with ad-hoc financial analytics.

2019

60

respondents

2018

59 respondents

Strengths

- Accessible to Customers
- Provides Effective Advice, Guidance
- Facilitates Problem Resolution

Opportunities

- Understands My Needs and Requirements
- Responds to Requests Within an Acceptable Time
- Moving in a Positive Direction

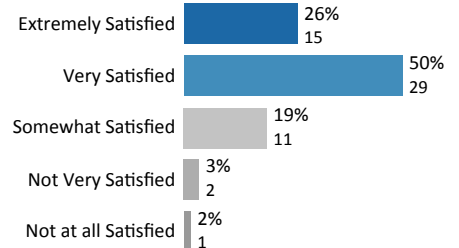
Overall Satisfaction

Thinking of your OVERALL experience with this department, how would you rate your satisfaction with it during the past 12 months in meeting your department's needs?

3.95

mean

Standard Deviation
0.86



Mean Scores **Below 3.00 - Low** | **3.00 to 3.59 - Marginal** | **3.60 to 4.29 - Good** | **4.30 & above - Excellent**

Mean Score

| # | Question | 2017 | 2018 | 2019 | 2019 change from prior year |
|----|---|------|------|------|-----------------------------|
| 1 | Thinking of your OVERALL experience with the Budget Office, how would you rate your satisfaction with it during the past 12 months? | | | | ↓ |
| 2 | Understands my needs and requirements | | | | |
| 3 | Accessible to customers (via phone, voicemail, e-mail, etc.) | | | | |
| 4 | Responsive to requests or problems within an acceptable time | | | | |
| 5 | Provides effective advice, support, and guidance | | | | |
| 6 | Facilitates problem resolution | | | | |
| 7 | Knowledgeable staff | | | | |
| 8 | Helpful staff | | | | |
| 9 | Effectively uses websites and systems to provide access to the Budget Office information and services | | | | |
| 10 | Moving in a positive direction to better meet my needs | | | | |

Background

★ Change from prior year is statistically significant

Change of 0.09 or greater

-
-
-
-
-
-
-



Net Promoter Score

Below 0 - Low | 0-19 - Marginal | 20-49 - Good | 50 & above - Excellent

The Customer Satisfaction Survey includes the question "How likely is it that you would share a positive impression of the Budget Office with others?" answered on a scale from 0 to 10. The Net Promoter Score is calculated as follows: the percent falling in the lowest segment (red section below) is subtracted from the percent falling in the highest segment (blue section below) to determine the Net Promoter (NPS) score.

| | |
|----------------------------------|----------------------------------|
| 2019 | 2018 |
| 22 NPS | 36 NPS |
| 43.1% - 21.6% = 22 | 50.0% - 14.0% = 36 |

| Detractor | | | | | Passive | | | Promoter | | |
|-----------|--|----|----|--|---------|----|-----|----------|-----|-----|
| 2% | | 2% | 4% | | 6% | 8% | 12% | 24% | 10% | 33% |
| 1 | | 1 | 2 | | 3 | 4 | 6 | 12 | 5 | 17 |

About NPS

The Net Promoter Score (NPS) is widely used in business to determine growth potential [1]. Different types of customers can have positive or negative effects on the success of the survey unit. The NPS identifies them as follows:

Detractors

Score 0-6 on the Recommend question. These are dissatisfied customers who will not promote or recommend the survey unit at all and may provide negative information to others.

Passives

Score in the neutral sections of the Recommend question (7-8). These are passive, neutral customers, who, while perhaps satisfied, are likely to do nothing to actively contribute to the success of the survey unit.

Promoters

Score 9-10 on the Recommend question. These are satisfied and enthusiastic customers.

The NPS score can potentially range from +100, where all customers are Promoters, to -100, where all customers are Detractors. Evaluation of the NPS is based on the following scale:

- Below 0 – LOW
- 0 to 19 – MARGINAL
- 20 to 49 – GOOD
- 50 & above - EXCELLENT

The cut-off points were developed by examining the distribution of NPS scores from over 300 survey departments rated by over 24,000 total customers from seven Universities (CSU Cal Poly, CSU Chancellor's Office, CSU Fullerton, CSU San Marcos, UC Davis, UC Riverside, and UC San Diego) participating in customer surveys. Along with Overall Satisfaction and unit Strengths and Opportunities, the NPS provides an externally-validated benchmark to help track progress over the course of future evaluations.

[1] Reichheld, Frederick F. (December 2003). "One Number You Need to Grow". *Harvard Business Review*.

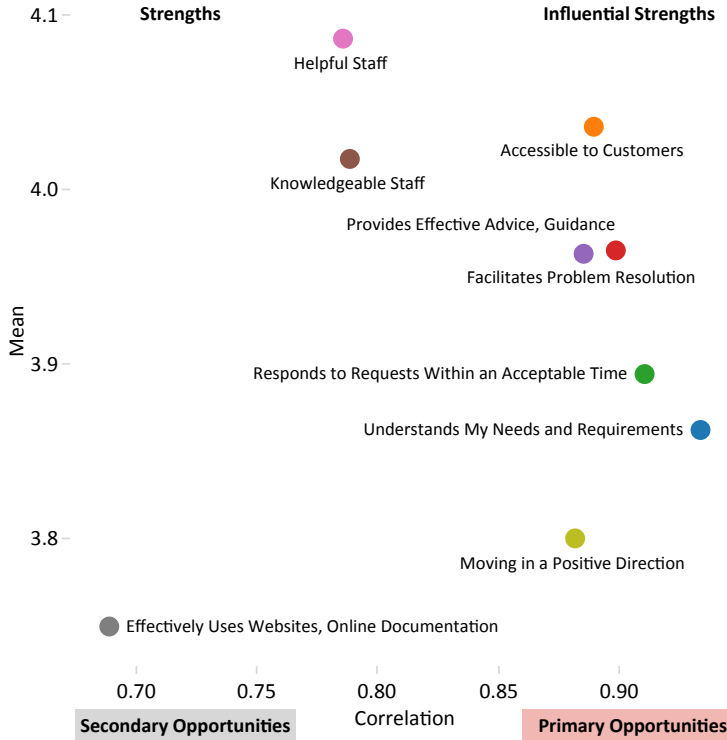


2019 CSU San Marcos CSS Budget Office

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Strengths and Opportunities by Survey Question With Axes at the Average Question Mean and Average Question by Overall Satisfaction Correlation

Correlation Coefficient Average = 0.85, Mean Average = 3.93



- Accessible to Customers
- Helpful Staff
- Knowledgeable Staff
- Moving in a Positive Direction
- Provides Effective Advice, Guidance
- Facilitates Problem Resolution
- Understands My Needs and Requirements
- Effectively Uses Websites, Online Documentation
- Responds to Requests Within an Acceptable Time

Strengths
Higher than average mean score, lower than average correlation.
"Keep up the good work"

Influential Strengths
Higher than average mean score, higher than average correlation.
"Keep an eye on"

Secondary Opps
Lower than average mean score, lower than average correlation.
"Low Priority"

Primary Opps
Lower than average mean score, higher than average correlation.
"Concentrate Efforts"

List of Strengths & Opportunities by Question ST - Strength | IS - Influential Strength | PO - Primary Opportunity | SO - Secondary Opportunity

| # | Question | Mean | Corr | Str/Opps |
|----|---|------|------|----------|
| 2 | Understands my needs and requirements | 3.86 | 0.93 | PO |
| 3 | Accessible to customers (via phone, voicemail, e-mail, etc.) | 4.04 | 0.89 | IS |
| 4 | Responsive to requests or problems within an acceptable time | 3.89 | 0.91 | PO |
| 5 | Provides effective advice, support, and guidance | 3.96 | 0.90 | IS |
| 6 | Facilitates problem resolution | 3.96 | 0.89 | IS |
| 7 | Knowledgeable staff | 4.02 | 0.79 | ST |
| 8 | Helpful staff | 4.09 | 0.79 | ST |
| 9 | Effectively uses websites and systems to provide access to the Budget Office information and services | 3.75 | 0.69 | SO |
| 10 | Moving in a positive direction to better meet my needs | 3.80 | 0.88 | PO |



2019 CSU San Marcos CSS

Budget Office

Satisfaction Mean Scores by Classification **Below 3.00 - Low** | **3.00 to 3.59 - Marginal** | **3.60 to 4.29 - Good** | **4.30 & above - Excellent**

| | Overall Satisfaction | Understands My Needs and Requirements | Accessible to Customers | Responds to Requests Within an Acceptable Time | Provides Effective Advice, Guidance | Facilitates Problem Resolution | Knowledgeable Staff | Helpful Staff | Effectively Uses Websites, Online Documentation | Moving in a Positive Direction |
|---------|----------------------|---------------------------------------|-------------------------|--|-------------------------------------|--------------------------------|---------------------|---------------|---|--------------------------------|
| Faculty | | | | | | | | | | |
| Staff | | | | | | | | | | |

Number of respondents in parenthesis: (n). The (n) is not shown when the number of respondents is fewer than five





Satisfaction Mean Scores by Division and Classification **Below 3.00 - Low** | **3.00 to 3.59 - Marginal** | **3.60 to 4.29 - Good** | **4.30 & above - Excellent**

| | | Overall Satisfaction | Understands My Needs and Requirements | Accessible to Customers | Responds to Requests Within an Acceptable Time | Provides Effective Advice, Guidance | Facilitates Problem Resolution | Knowledgeable Staff | Helpful Staff | Effectively Uses Websites, Online Documentation | Moving in a Positive Direction |
|-------------------------------------|---------|----------------------|---------------------------------------|-------------------------|--|-------------------------------------|--------------------------------|---------------------|---------------|---|--------------------------------|
| Academic Affairs | Staff | | | | | | | | | | |
| CEHHS | Faculty | | | 0 | | | | 0 | | | |
| CHABSS | Faculty | | | 0 | | | | 0 | | | |
| Community Engagement | Staff | | | | | | | | | | |
| Finance and Administrative Services | Staff | | | | | | 0 | | | | |
| Office of the President | Staff | | | | | | | | | | |
| Student Affairs | Staff | | | | | | | | | | |
| University Advancement | Staff | | | | | | 0 | | | | |

Number of respondents in parenthesis: (n). The (n) is not shown when the number of respondents is fewer than five.
 Blank cells: respondents did not provide an answer to the question.