

CUSTOMER SATISFACTION SURVEY

FINANCIAL SYSTEMS OPERATIONS

2018/19

Maintains the university's financial system, CFS PeopleSoft Finance, and provides assistance to those using the system.



4.27
OVERALL SATISFACTION WITH
FINANCIAL SYSTEMS OPERATIONS



64
RESPONDENTS



35
NET PROMOTER SCORE



4.21
MOVING IN A POSITIVE DIRECTION
TO MEET CUSTOMER NEEDS

STRENGTHS & OPPORTUNITIES

STRENGTHS

Accessible to Customers
Provides Effective Advice, Guidance
Helpful Staff

OPPORTUNITIES FOR IMPROVEMENT

Understands My Needs and Requirements
Moving in a Positive Direction
Effectively Uses Websites, Online Documentation

SURVEY ITEMS



**UNDERSTANDS
CUSTOMER NEEDS**



**ACCESSIBLE TO
CUSTOMERS**



**RESPONSIVE TO
REQUESTS**



**PROVIDES EFFECTIVE
ADVICE & GUIDANCE**



**RESOLVES PROBLEMS
EFFECTIVELY**



KNOWLEDGEABLE STAFF



HELPFUL STAFF



**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 Financial Systems Operations

Maintains the university's financial system, CFS PeopleSoft Finance, and provides assistance to those using the system.

2019

64
respondents

2018

43 respondents

Strengths

- Accessible to Customers
- Provides Effective Advice, Guidance
- Helpful Staff

Opportunities

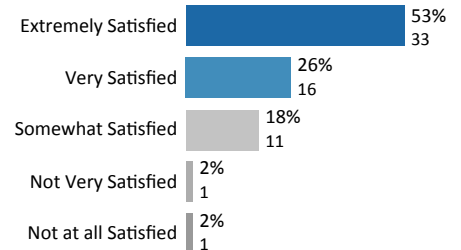
- Understands My Needs and Requirements
- Moving in a Positive Direction
- Effectively Uses Websites, Online Documentation

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?

4.27
mean

Standard Deviation
0.92



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

#	Question	Mean Score			2019 change from prior year
		2017	2018	2019	
1	Thinking of your OVERALL experience with Financial Systems Operations, how would you rate your satisfaction with it during the past 12 months?	4.24	4.34	4.27	
2	Understands my needs and requirements	4.17	4.21	4.15	
3	Accessible to customers (via phone, voicemail, e-mail, etc.)	4.34	4.29	4.40	→
4	Responsive to requests or problems within an acceptable time	4.33	4.34	4.44	→
5	Provides effective advice, support, and guidance	4.34	4.29	4.37	
6	Facilitates problem resolution	4.33	4.28	4.32	
7	Knowledgeable staff	4.32	4.37	4.34	
8	Helpful staff	4.46	4.39	4.47	
9	Effectively uses websites and systems to provide access to Financial Systems Operations information and services	4.32	4.10	4.12	
10	Moving in a positive direction to better meet my needs	4.28	4.26	4.21	

Background

★ Change from prior year is statistically significant

Change of 0.09 or greater

- Survey Period: February 20 to March 8, 2019
- 32 departments across campus participated
- 16,786 - 902 staff, 900 faculty, and 14,984 students were invited to take the survey
- 1,815 (11%) total responded. Staff - 357, Faculty - 119, Student - 1,339
- 10 standard satisfaction questions + 1 NPS (optional) + up to 5 supplemental questions were asked in each survey department
- Verbatim comments: 2 standard (Like best, Improve) plus up to 2 burning questions for each department
-



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 Financial Systems Operations 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
35 NPS	42 NPS
53.7% - 18.5% = 35	55.6% - 13.9% = 42

Detractor				Passive				Promoter		
		4%	2%	2%	4%	7%	15%	13%	13%	41%
		2	1	1	2	4	8	7	7	22

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.

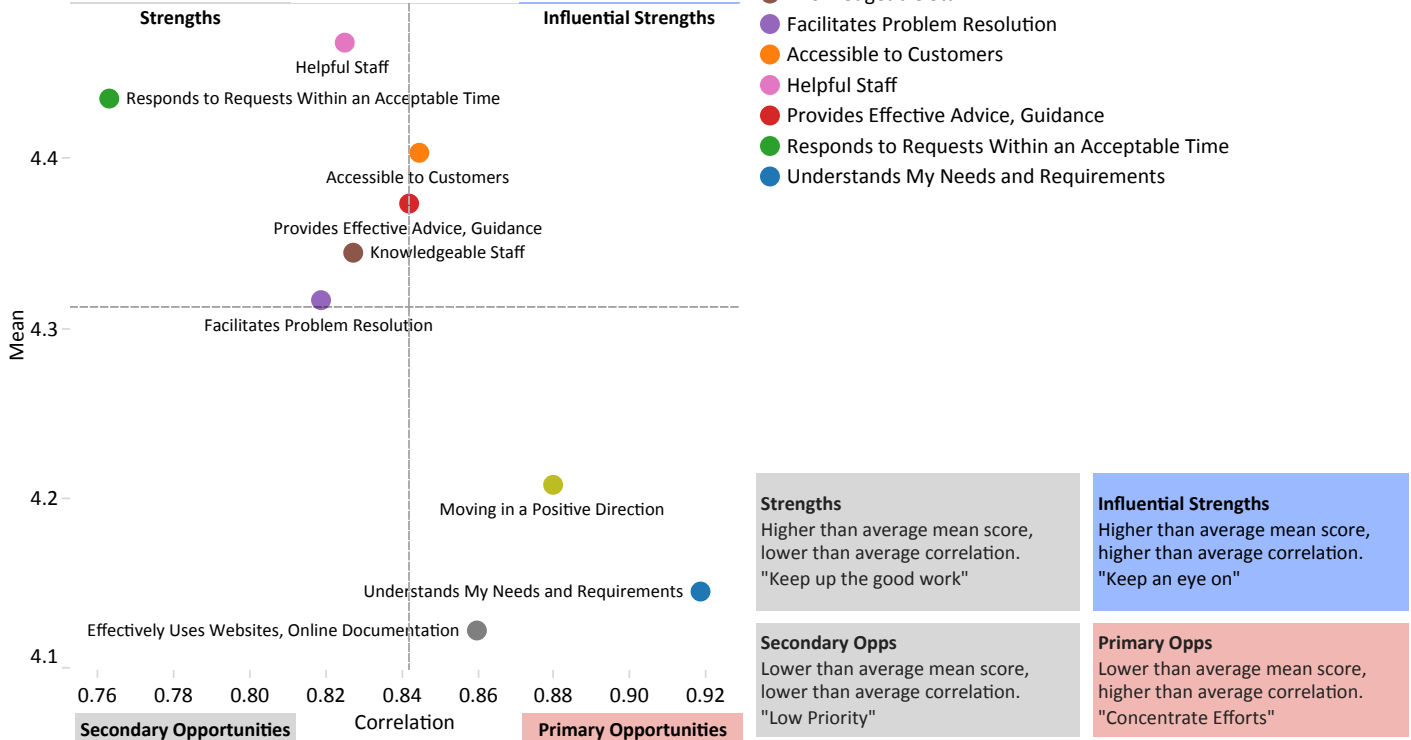
[1] Reichheld, Frederick F. (December 2003). "One Number You Need to Grow". *Harvard Business Review*.



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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 = 0.84, Mean Average = 4.31



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	4.15	0.92	PO
3	Accessible to customers (via phone, voicemail, e-mail, etc.)	4.40	0.84	IS
4	Responsive to requests or problems within an acceptable time	4.44	0.76	ST
5	Provides effective advice, support, and guidance	4.37	0.84	IS
6	Facilitates problem resolution	4.32	0.82	ST
7	Knowledgeable staff	4.34	0.83	ST
8	Helpful staff	4.47	0.82	ST
9	Effectively uses websites and systems to provide access to Financial Systems Operations information and services	4.12	0.86	PO
10	Moving in a positive direction to better meet my needs	4.21	0.88	PO



2019 CSU San Marcos CSS
Financial Systems Operations

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			0							
Community Engagement	Staff			0				0			
Finance and Administrative Services	Staff										
Office of the President	Staff			0				0			
Student Affairs	Staff							0			
University Advancement	Staff										

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.