

State of Texas
Department of Information Resources



Exhibit 3.5

Satisfaction Surveys

Texas.gov Payment Services
DIR-ESS-TGOV-PMNT-254

Table of Contents

1 INTRODUCTION..... 3

2 METHODOLOGY 3

3 SURVEY INITIATIVES 3

 3.1 Overall Customer Satisfaction Survey 3

 3.2 Monthly Customer Scorecards 4

 3.3 Service Desk Surveys 4

 3.4 Texas.gov Portal Survey 4

 3.5 Texas.gov Service Application Survey 5

4 CUSTOMER SATISFACTION REQUIREMENTS..... 5

 4.1 Service Component Providers’ Responsibilities 5

1 INTRODUCTION

This Exhibit describes the requirements related to developing and administering feedback mechanisms such as customer and constituent satisfaction surveys for measuring, analyzing, reporting, and improving both the customer and Constituents' overall experience with Payment Services SCP. Each feedback mechanism collects quantitative and/or qualitative data that may be analyzed for improvement opportunities.

2 METHODOLOGY

All surveys shall follow research standards for quality, response rates, and industry best practices, including:

1. Survey questions will be validated and approved by DIR prior to use;
2. Use of scale that provides adequate granularity;
3. Use of open-ended questions, when appropriate;
4. Use of tailored survey questions based on the actual Services received;
5. Protection of customer confidentiality, to include the allowance of optional anonymous responses, as instructed by DIR; and
6. Sampling, data collection, and objective analysis to protect against bias and promote impartial results.

3 SURVEY INITIATIVES

To meet DIR's desire for objective and comparable results, the Successful Respondent shall participate in the following five (5) survey initiatives to gather customer feedback and measure satisfaction.

3.1 Overall Customer Satisfaction Survey

The Successful Respondent shall support the MSI-driven Overall Customer Satisfaction Survey which will capture the Customer satisfaction surveys of the Payment Services SCP. This annual survey will target a high volume of participation of the following separate Customer audiences:

1. Customer Business Executives;
2. Customer IT Staff; and
3. DIR Staff.

The Successful Respondent shall:

- 3.1.1 Support the MSI as requested in developing survey questions.
- 3.1.2 Review the survey results as provided by the MSI and develop mitigating actions as requested by the MSI or DIR.
- 3.1.3 Create a Customer Satisfaction Improvement plan for the Successful Respondent's scope of services with the participation of the MSI as specified in **Exhibit 3.3 Critical Deliverables**.

3.2 Monthly Customer Scorecards

The Monthly Customer Scorecard is intended to identify each Customer's rating of the SCPs' and MSI's performance against the contract requirements for each DIR Shared Service. The Scorecard is intended to be a self-service reporting tool that is executed within a central repository for the collection of monthly customer feedback, development of corrective actions, and reporting to DIR.

The Successful Respondent shall review the survey results, determine corrective actions for assigned issues, lead resolution of assigned corrective actions and support the MSI-led improvement program.

The Successful Respondent shall:

- 3.2.1 Analyze and review Payment Services related feedback and trends;
- 3.2.2 Determine corrective actions for assigned issues and areas for improvement;
- 3.2.3 Keep the MSI informed while leading and executing assigned corrective actions or improvement initiatives.

3.3 Service Desk Surveys

The Service Desk Survey is intended to identify each Customer's rating pertaining to the level of service they received upon contacting the Service Desk.

The Successful Respondent shall review the Payment Services related survey results, determine corrective actions for assigned issues, lead resolution of assigned corrective actions and support the MSI-led improvement program.

The Successful Respondent shall:

- 3.3.1 Analyze and review Payment Services related feedback and trends;
- 3.3.2 Determine corrective actions for assigned issues and areas for improvement;
- 3.3.3 Keep the MSI informed while leading and executing assigned corrective actions or improvement initiatives.

3.4 Texas.gov Portal Survey

The Texas.gov Portal Survey is intended to identify the level of satisfaction by Constituents utilizing the Texas.gov Portal. The Texas.gov Portal Survey is an optional in-application, post-service survey. Conducting the Texas.gov Portal Survey is the responsibility of the Successful Texas.gov Services Respondent.

The Successful Payment Services Respondent shall, at a minimum:

- 3.4.1 Develop questions to be used in the survey, subject to DIR approval.
 - 3.4.1.1 Design questions to elicit Constituent responses in key areas as determined by DIR

- 3.4.2 Analyze and review feedback and trends;
- 3.4.3 Determine corrective actions for assigned issues and areas for improvement;
- 3.4.4 Keep the MSI informed while leading and executing assigned corrective actions or improvement initiatives.

3.5 Texas.gov Service Application Survey

The Texas.gov Service Application Survey is intended to identify the level of satisfaction by constituents utilizing specific Texas.gov applications. The Texas.gov Service Application Survey is an optional in-application, post-service survey.

Conducting the Texas.gov Portal Survey is the responsibility of the Successful Texas.gov Services Respondent.

The Successful Payment Services Respondent shall, at a minimum:

- 3.5.1 Develop questions to be used in the survey, subject to DIR approval.
 - 3.5.1.1 Design questions to elicit Constituent responses in key areas as determined by DIR
- 3.5.2 Analyze and review feedback and trends;
- 3.5.3 Determine corrective actions for assigned issues and areas for improvement;
- 3.5.4 Keep the MSI informed while leading and executing assigned corrective actions or improvement initiatives.

4 CUSTOMER SATISFACTION REQUIREMENTS

The MSI will have responsibility for conducting the development, maintenance, and execution of the customer surveys for all DIR Shared Services. The MSI shall facilitate distribution, collect responses, tabulate results, develop corrective actions, and report results back to DIR and DIR Customers as part of an ongoing program for measuring and improving customer satisfaction across all DIR Shared Services. The MSI shall collect these responses, tabulate results, develop improvement initiatives in coordination with the Payment Services SCP, and report results to DIR and DIR Customers.

4.1 Service Component Providers' Responsibilities

Successful Respondent has the responsibility to support the MSI in developing, reporting, and tracking customer satisfaction. Successful Respondent shall follow the MSI's process as defined in the SMM to respond to Customer and Constituent feedback obtained through the survey processes.

Successful Respondent shall coordinate with the MSI to meet the requirements and responsibilities to do the following:

- 4.1.1 Analyze customer satisfaction for the Payment Services DIR Shared Service, as appropriate.
- 4.1.2 Make recommendations for survey questions pertaining to service areas within the Service Components.
- 4.1.3 Establish annual and monthly performance goals for Customer and Constituent satisfaction with input from DIR.
- 4.1.4 Review results of surveys and customer scorecard comments to identify trends.
- 4.1.5 Promptly submit recommendations and implementation plans for areas requiring attention to the MSI.
- 4.1.6 Track and report progress of implementations toward the improvement of customer satisfaction on a quarterly basis.