

**State of Texas**  
**Department of Information Resources**



**Texas.gov Services**

**Exhibit 3.5**

**Satisfaction Surveys**

**DIR-ESS-TGOV-SVCS-254**

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## 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 Texas.gov Services. Each feedback mechanism collects quantitative and/or qualitative data that may be analyzed for improvement opportunities.

The Successful Texas.gov Respondent is responsible for the development and administration of the following feedback mechanisms:

1. Constituent Texas.gov Services Portal Surveys; and
2. Constituent Texas.gov Service Application Surveys.

## 2 METHODOLOGY

For all surveys, the Successful Respondent 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 utilize, at a minimum, six (6) survey initiatives in gathering customer feedback to 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 Texas.gov Service. 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 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 Texas.gov 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 Texas.gov 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 Texas.gov 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 Constituent Live-help (Chat) Survey**

The Constituent Live-help (Chat) Survey is intended to identify the level of customer satisfaction by users (State of Texas Constituents) utilizing the live-help chat functionality of the Texas.gov website. The Constituent Live-help (Chat) Survey is an optional in-application, post-service

survey intended to identify each user's rating pertaining to the level of service they received upon using the Live-Help service.

The Successful Respondent shall review the Texas.gov 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:

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

The MSI is responsible for providing a live chat tool and the Texas.gov SCP is responsible for embedding the chat API into the application. The constituent will chat with MSI personnel through the Constituent Help Desk. The Constituent will be offered a Customer Satisfaction Survey through the MSI's chat tool, and the MSI is responsible for gathering and analyzing constituent feedback. When there is feedback concerning applications, the MSI will send that feedback to the Texas.gov SCP to analyze and determine corrective actions. When there is feedback concerning the constituent's chat experience, the MSI will analyze and determine corrective actions the MSI will take to address the feedback.

### **3.5 Texas.gov Portal Survey**

The Texas.gov Portal Survey is intended to identify the level of customer satisfaction by users (State of Texas 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 Texas.gov 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 Develop and maintain surveys and survey results to measure Constituent satisfaction and capture feedback;
- 3.5.3 Implement the survey and instructions on the Texas.gov Portal in a location approved by DIR;
- 3.5.4 Develop and maintain a central repository for the historical collection of the survey results;
- 3.5.5 Collect all survey feedback responses by the monthly date approved by DIR;
- 3.5.6 Provide the survey feedback to the MSI;

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

### **3.6 Texas.gov Service Application Survey**

The Texas.gov Service Application Survey is intended to identify the level of customer satisfaction by users (State of Texas 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 Texas.gov Services Respondent shall, at a minimum:

- 3.6.1 Develop questions to be used in the survey, subject to DIR approval.
  - 3.6.1.1 Design questions to elicit Constituent responses in key areas as determined by DIR
- 3.6.2 Develop and maintain surveys and survey results to measure Constituent satisfaction and capture feedback;
- 3.6.3 Implement the survey and instructions on the Texas.gov Portal in a location approved by DIR;
- 3.6.4 Develop and maintain a central repository for the historical collection of the survey results;
- 3.6.5 Collect all survey feedback responses on the schedule approved by DIR;
- 3.6.6 Provide the survey feedback to the MSI;
- 3.6.7 Analyze and review feedback and trends;
- 3.6.8 Determine corrective actions for assigned issues and areas for improvement;
- 3.6.9 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 Texas.gov Services SCP will have the responsibility for conducting the development, maintenance, and execution of surveys that are delivered as optional in-application, post-service surveys, targeting constituents. The MSI shall collect these responses from the Texas.gov Services SCP, tabulate results, develop improvement initiatives in coordination with the Texas.gov 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 Texas.gov DIR Shared Service, as appropriate.
- 4.1.2 Make recommendations for survey questions pertaining to service areas within the Service Components.
- 4.1.3 Submit in-application, post-service survey responses to the MSI.
- 4.1.4 Establish annual and monthly performance goals for Customer and Constituent satisfaction with input from DIR.
- 4.1.5 Review results of surveys and customer scorecard comments to identify trends.
- 4.1.6 Promptly submit recommendations and implementation plans for areas requiring attention to the MSI.
- 4.1.7 Track and report progress of implementations toward the improvement of customer satisfaction on a quarterly basis.