

# Measuring Customer Satisfaction



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*Exceptional  
service  
in the  
national  
interest*



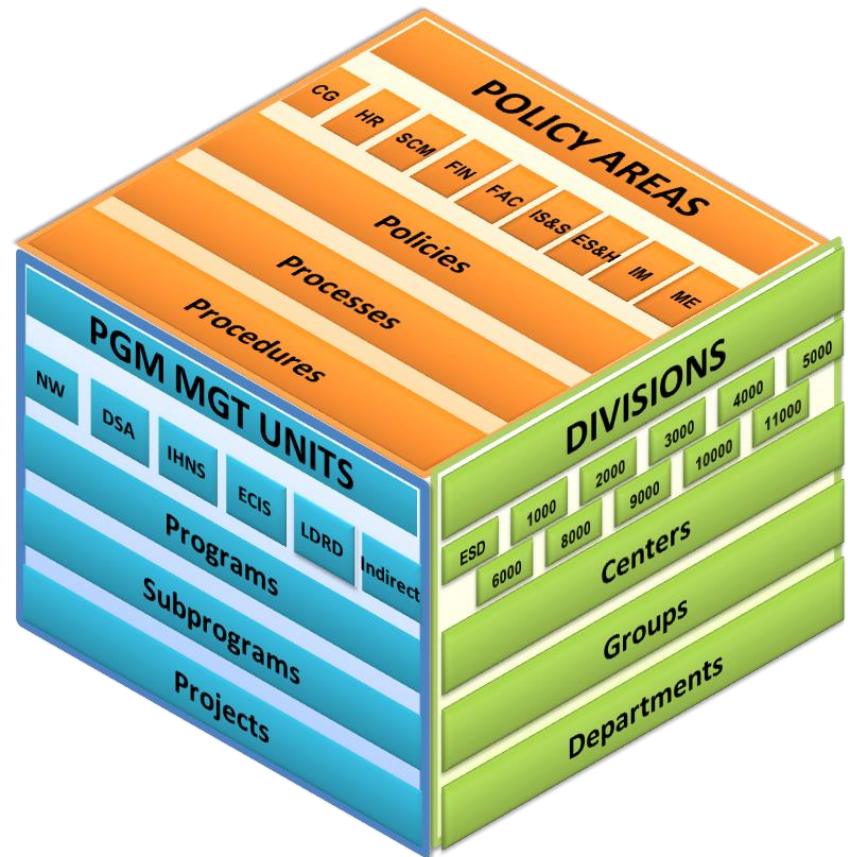
Sandia National Laboratories is a multi-program laboratory managed and operated by Sandia Corporation, a wholly owned subsidiary of Lockheed Martin Corporation, for the U.S. Department of Energy's National Nuclear Security Administration under contract DE-AC04-94AL85000.

# What we are going to talk about

- What is Sandia's customer feedback strategy?
- How is the customer survey conducted?
- What results are achieved?
- What has worked well?
- What are some challenges?
- What are some next steps for continual improvement?

# Before we start...some important terms

- **Program Management Units (PMUs)**
  - PMUs secure work and funding from either external or internal customers
  - Tasks and funding distributed to particular divisions, project by project
- **Divisions**
  - Divisions are line organizations
  - Operational responsibilities to perform work assigned to them by PMUs
  - Steward their capabilities and workforce
  - Operate effectively, efficiently, and in compliance with regulations and constraints



# CUSTOMER FEEDBACK STRATEGY

# Feedback strategy and objectives

## Strategy

Measure customer perception by means of an annually conducted survey using a stratified approach to determine data population.

## Objectives

Assure an unbiased, valid, and representative measurement is obtained to identify customer perception and foster continuous improvement.

Ascertain strengths and weaknesses at the corporate wide level and to understand customer perceptions specific to programs.

Solicit feedback as a coordinated activity across Sandia to reduce duplication of efforts and minimize number of queries to a single customer.

# **CUSTOMER SURVEY PROCESS (WHO, WHAT, WHEN, HOW)**

# WHO - Survey target audiences

## Key customers are:

- High level officials with whom Sandia deals (or would like to)
- Individual identified by PMU VP and program managers who may influence direction of Sandia
- These individuals are always interviewed rather than mailed a survey
- Sampled every other year

## Project customers are:

- Middle level official with whom Sandia deals
- Identified by Sandia project/ program manager
- Stratified random sampling from funding/ project/ charging codes
- Surveys conducted online, telephone, or interview
- Surveys are conducted each year

# WHO - Roles and Responsibilities for Executing the Process

**Project Administration:** Facilitate the completion of sampling, survey release, collection, and reporting; find resolutions, and provide liaison with PMUs where requested.

**PMU Representative:** Deliver summary findings internally and provide summary findings to SFO as part of PMU deliverable. Liaison with VP, internal Directors, and project managers.

**Statistician:** Analyze data received and provide summary findings.

**Database (IT) Support:** Program survey and website, transfer online survey results to tool, and develop standard reports.

**Mission Integration liaison:** Liaise between C-Sat team, SFO, and Mission Vice-President.



# WHAT - Key Customer Question Set



You have been identified by Sandia National Laboratories' Executive Management as one of our key customers whose feedback is essential. This feedback provides vital data regarding Sandia National Laboratories' performance in providing exceptional service in the national interest and becoming the laboratory that customers turn to first for technology solutions to their most challenging problems.

Survey \_\_\_\_\_ Key Customer Name: \_\_\_\_\_ Sandia Contact: \_\_\_\_\_

Respondent's Name (If different from Key Customer Above): \_\_\_\_\_ Interviewer's name: \_\_\_\_\_

Please select one: Survey conducted by:  Mail  Phone Interview  Personal Interview

## Part I: Customer Satisfaction

**1. Please identify what Sandia National Laboratories is doing well. How important is this to you?**

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**2. Please identify what Sandia National Laboratories needs to improve. How important is this to you?**

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**3. Please identify areas where you think Sandia National Laboratories should increase or decrease its activities.**

*Increase or add:*

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*Decrease or eliminate:*

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# WHAT - Key Customer Question Set



## Part II: Overall Evaluation

Survey: \_\_\_\_\_

Please rate, by circling the appropriate number, each item listed below on the scales provided.

### 1. What is your overall level of satisfaction with Sandia National Laboratories' work?

Very Dissatisfied 1 2 3 4 5 6 7 8 9 10 Very Satisfied

### 2. How would you rate your willingness to continue to work with Sandia National Laboratories?

Extremely Unwilling 1 2 3 4 5 6 7 8 9 10 Extremely Willing

### 3. How would you rate your willingness to recommend Sandia National Laboratories to a colleague or business associate?

Extremely Unwilling 1 2 3 4 5 6 7 8 9 10 Extremely Willing

### 4. Compared to this time last year your Overall Level of Satisfaction with Sandia National Laboratories' work has ....

Decreased 1 2 3 4 5 6 7 8 9 10 Increased N/A

## Part III: Customer Comments

Additional comments:

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Thank you for your participation

# WHAT - Project Customer Question Set

## 2013 Project/Program External Customer Satisfaction Survey

The purpose of this survey is to determine the satisfaction and importance of various project/program factors to you as an external customer of Sandia National Laboratories (SNL).

Survey: \_\_\_\_\_ Project/Program Name: \_\_\_\_\_ Sandia Contact: \_\_\_\_\_

Customer's Name: \_\_\_\_\_ Interviewer's name (if applicable): \_\_\_\_\_

Please select one: Method of Survey:  Email  Phone Interview  Personal Interview

### Project/Program Satisfaction

Please rate, by selecting the appropriate number, each item listed below on each of the scales provided. The first rating scale pertains to your level of satisfaction. The second rating is an identification of which attributes are most important to you in your Sandia relationship.

Category	Item	Satisfaction of Item to You						Indicate items of "most" importance (no more than five)
		Poor	Satisfactory			Excellent	High Importance ✓	
		1	2	3	4	5		NA
<b>Performance</b>	1. Appropriate scope of work negotiated	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	2. Project/program technical requirements identified and met	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Schedule</b>	3. Schedule clearly negotiated or renegotiated as needed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	4. Schedule milestones met	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Project Management</b>	5. Project well managed by SNL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	6. Products or services benefited from teaming	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Relationship</b>	7. SNL took initiative to understand my needs fully	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	8. SNL responsive to my changing needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Customer's Culture/Values Reflected</b>	9. SNL respected customer's culture/values in interactions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	10. SNL considered customer's culture/values in work proposed and performed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Communication</b>	11. Contacts at SNL easy to reach when necessary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	12. Letters, proposals, reports, etc. clearly written	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Value</b>	13. Products/services costs appropriate for value received	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	14. Products/services delivered within negotiated budget	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Overall Evaluation

Please rate, by selecting the appropriate number, each item listed below on the scales provided. **Please select only one rating.**

1. What is your overall level of satisfaction with Sandia National Laboratories' work? Very Dissatisfied 1 2 3 4 5 Very Satisfied

2. Based on our performance, would you continue to work with Sandia National Laboratories? Unlikely 1 2 3 4 5 Very Likely

3. Based on our performance, would you recommend Sandia National Laboratories to a colleague or business associate? Unlikely 1 2 3 4 5 Very Likely

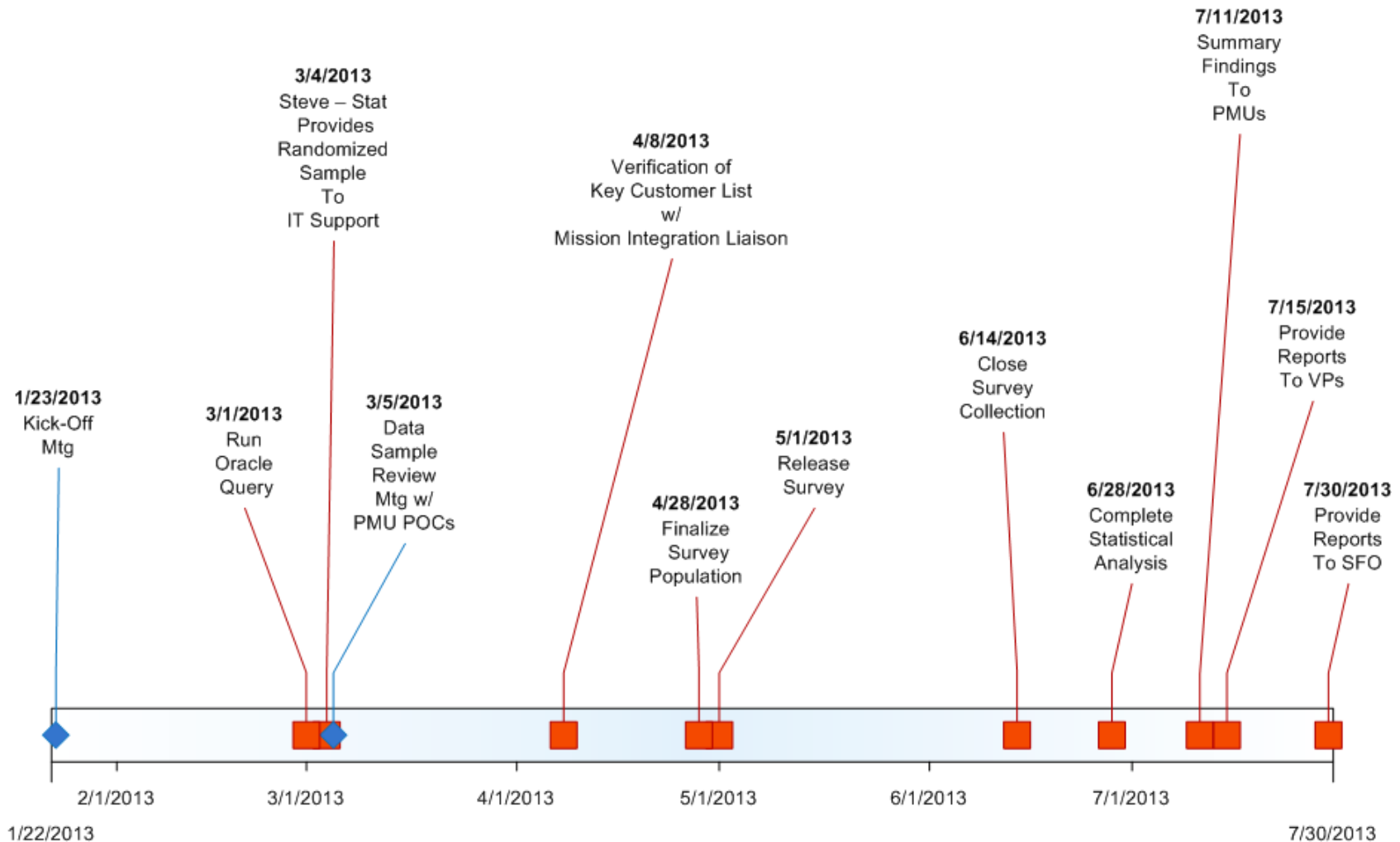
Please comment on Sandia's strengths and areas for improvement:

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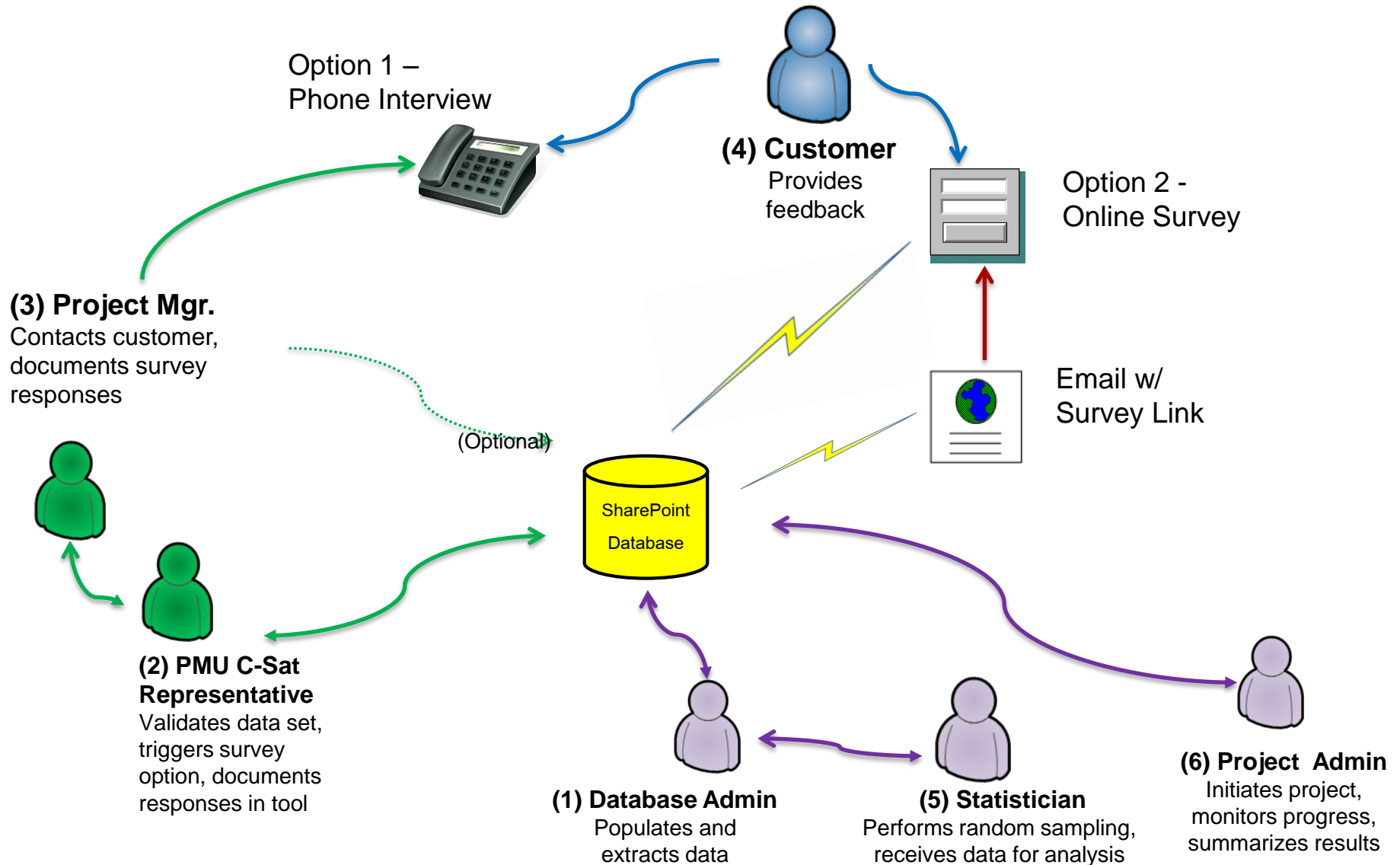


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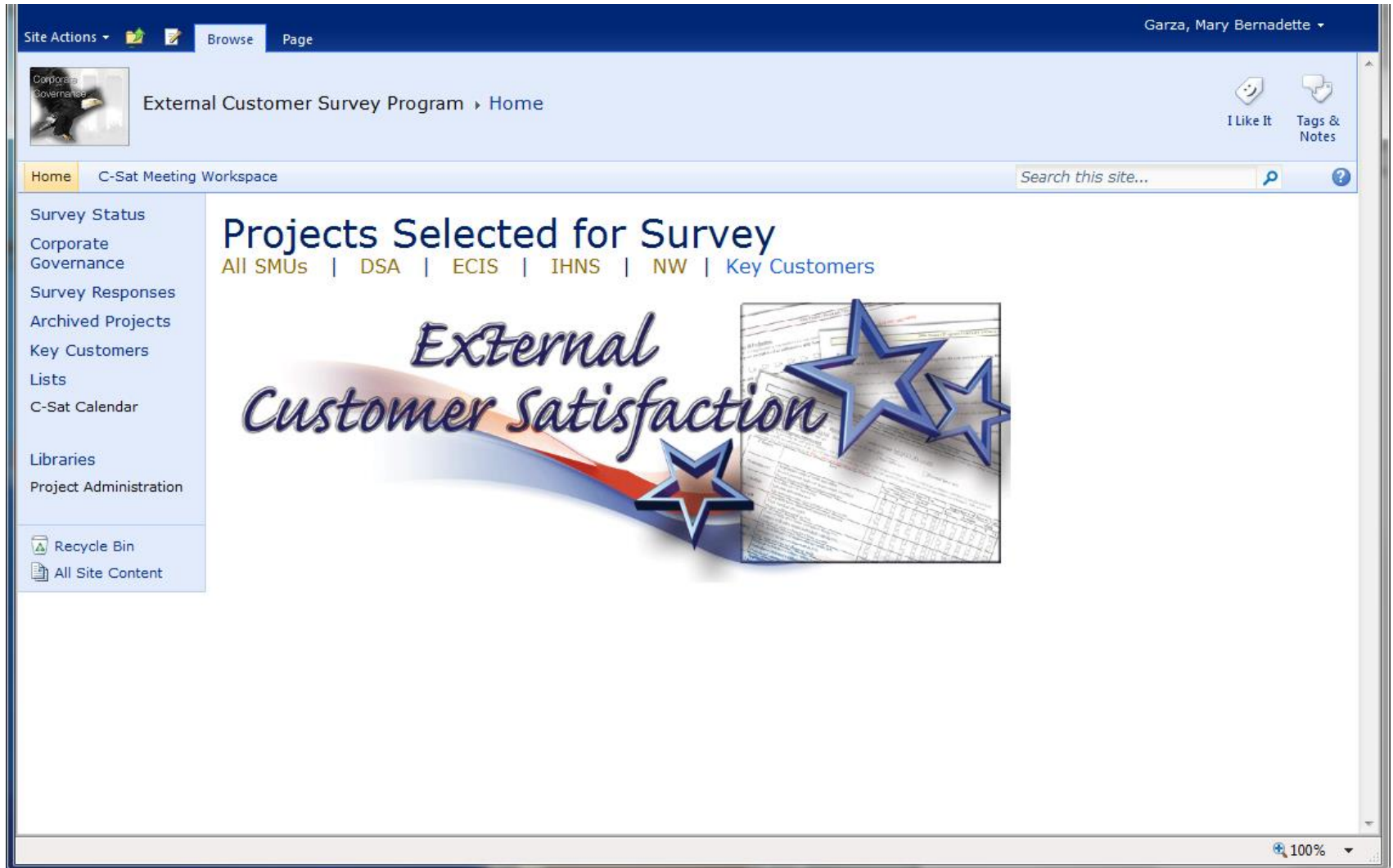
# WHEN - Project Timeline Example



# HOW – Survey Process



# SharePoint Site



The screenshot shows a SharePoint site interface. At the top, there is a navigation bar with "Site Actions" and "Page" options, and a user profile for "Garza, Mary Bernadette". Below this is a breadcrumb trail: "External Customer Survey Program > Home". A search bar is located on the right side of the page. The main content area features a large graphic with the text "External Customer Satisfaction" in a stylized font, accompanied by several blue stars and a document image. The left sidebar contains a navigation menu with the following items: "Survey Status", "Corporate Governance", "Survey Responses", "Archived Projects", "Key Customers", "Lists", "C-Sat Calendar", "Libraries", "Project Administration", "Recycle Bin", and "All Site Content".

Site Actions | Browse | Page | Garza, Mary Bernadette

External Customer Survey Program > Home

Home | C-Sat Meeting Workspace | Search this site...

## Projects Selected for Survey

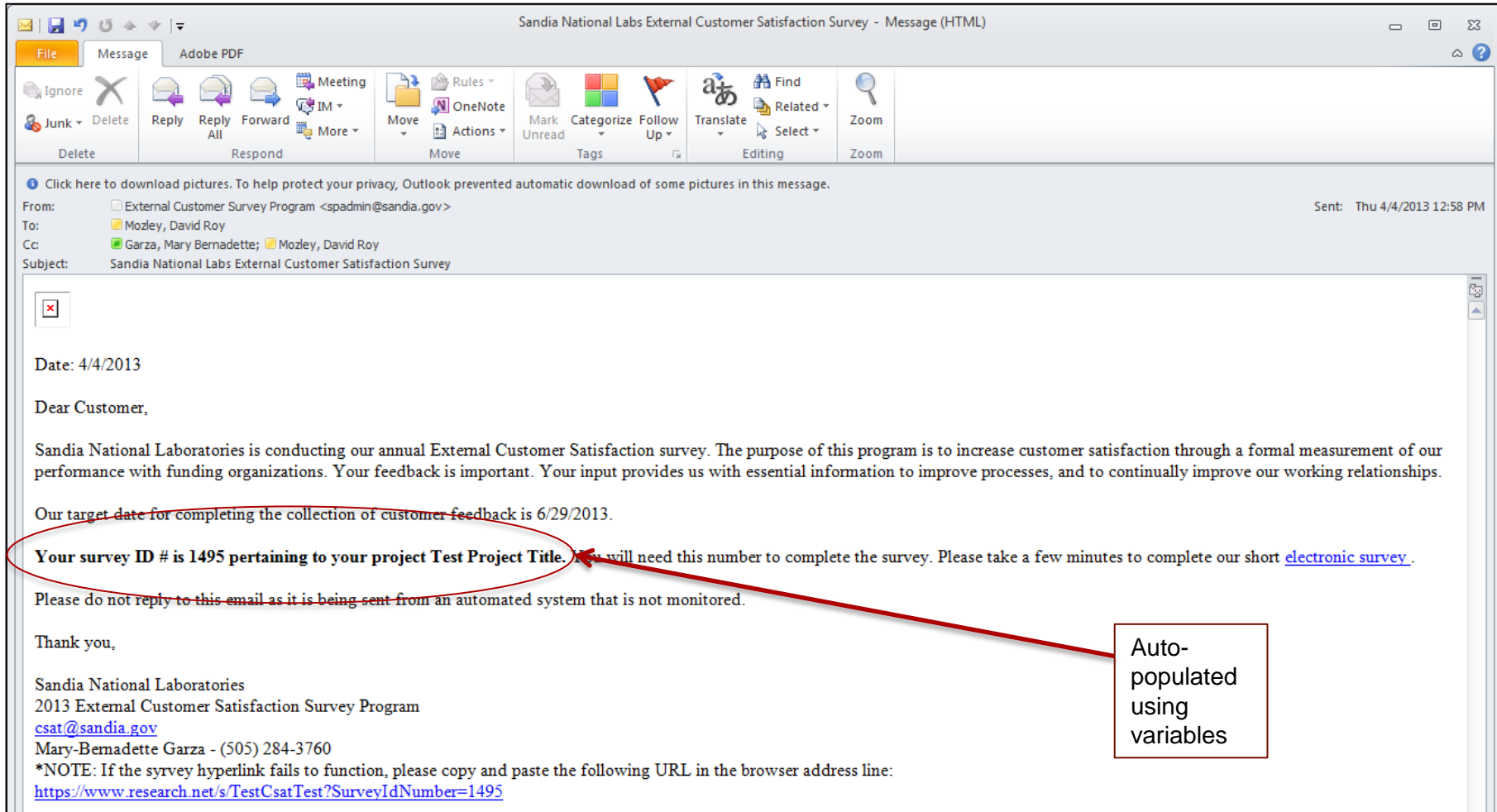
All SMUs | DSA | ECIS | IHNS | NW | Key Customers

### External Customer Satisfaction

Recycle Bin | All Site Content

100%

# Email Example



Sandia National Labs External Customer Satisfaction Survey - Message (HTML)

File Message Adobe PDF

Ignore, Delete, Reply, Reply All, Forward, Meeting, IM, More, Move, OneNote, Actions, Mark Unread, Categorize, Follow Up, Translate, Find, Related, Select, Zoom

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

From: External Customer Survey Program <spadmin@sandia.gov> Sent: Thu 4/4/2013 12:58 PM  
 To: Mozley, David Roy  
 Cc: Garza, Mary Bernadette; Mozley, David Roy  
 Subject: Sandia National Labs External Customer Satisfaction Survey

Date: 4/4/2013

Dear Customer,

Sandia National Laboratories is conducting our annual External Customer Satisfaction survey. The purpose of this program is to increase customer satisfaction through a formal measurement of our performance with funding organizations. Your feedback is important. Your input provides us with essential information to improve processes, and to continually improve our working relationships.

Our target date for completing the collection of customer feedback is 6/29/2013.

**Your survey ID # is 1495 pertaining to your project Test Project Title.** You will need this number to complete the survey. Please take a few minutes to complete our short [electronic survey](#).

Please do not reply to this email as it is being sent from an automated system that is not monitored.

Thank you,

Sandia National Laboratories  
 2013 External Customer Satisfaction Survey Program  
[csat@sandia.gov](mailto:csat@sandia.gov)  
 Mary-Bernadette Garza - (505) 284-3760  
 \*NOTE: If the survey hyperlink fails to function, please copy and paste the following URL in the browser address line:  
<https://www.research.net/s/TestCsatTest?SurveyIdNumber=1495>

Auto-populated using variables

# PROCESS RESULTS ACHIEVED



# Process Results

Survey dates back to 1996 and has gone through several refinements based on best practices and industry standards.

Strategy was effect in reducing number of contacts made to the same customer.

Data collected to-date has provided substantiation of identified issues that are being addressed through our corporate strategic objectives and organizational improvement plans.

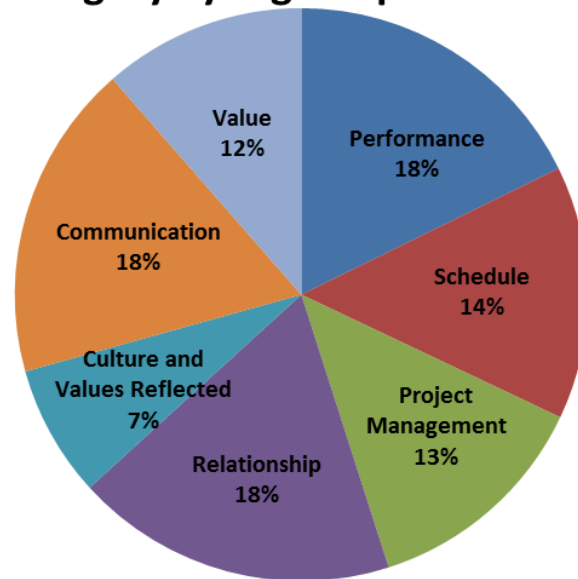
# Primary Trending indicators

- Quantitative responses
  - Satisfaction scores by category
  - Satisfaction scores by question
  
- Loyalty index derived from three key questions
  
- Qualitative analysis of comments referencing strengths and weakness

# Import to the customer in FY13

**Performance, Communication, and Relationship rank the highest in project customer importance**

**Category by High Importance Rating**



# SUCCESSSES

# Best Practices

An assessment finding indicated that an approximate  $\frac{1}{2}$  of 1% bias did exist for project managers who conducted their own survey interviews. *The bias indicated that Sandia project managers were slightly harder on their own activities, than would have been recorded if someone else conducted the interview.* (2005)

Sandia SFO/DOE representatives identified the survey as “best practice” in DOE. The survey and process were provided to Los Alamos and Lawrence Livermore Labs at their request. (2008)

The Sandia survey and process were identified as “best practice” in Lockheed Martin in assessment findings of DOE Diversity Maturity Model. (2008)

The survey process and methodology was reviewed by the Lockheed Martin Diversity Assessment auditors and identified as “best practice” in Lockheed Martin. The survey and process were provided to two other LM companies at their request. (2009)

# Practical Application

- Demonstrates our commitment to customer focus and inform decision-making process
- Provides the overall customer perspective by coordinating questions from different stakeholders into one instrument
- Uses statistical tools and expertise to obtain a representative sample for all PMUs to ensure a consistent methodology
- Provides documentation to meet multiple ISO registrations requirements within Sandia
- Affords input for Performance Evaluation Report

# SOME CHALLENGES

# Process feedback

- PMU offices prefer to do a customized survey and implement the survey at a different time during the fiscal year
- Customers perceive standardized question set as not applicable in some cases
- Survey results are not visibly tied to specific organizational corrective actions
- Single instrument does not appear to be fulfilling diverse internal needs
- Process is not perceived as providing sufficient actionable feedback



# CONTINUAL IMPROVEMENT

# Continual improvement

- Conduct a Structured Improvement Activity using Lean Six Sigma techniques
- Improve the customer feedback collection process and corresponding mechanisms
- Develop an interim product for FY14

# DIALOG & EXCHANGE



# BACKUP SLIDES

# Query Criteria

- Eliminate records tied to funding other than from a funding customer (IPA's, etc.)
- Projects that are too new
- Projects that are too old
- Closed projects
- On hold for closing
- Funding received from royalties