

Running Successful User Surveys Surprises and Lessons Learned

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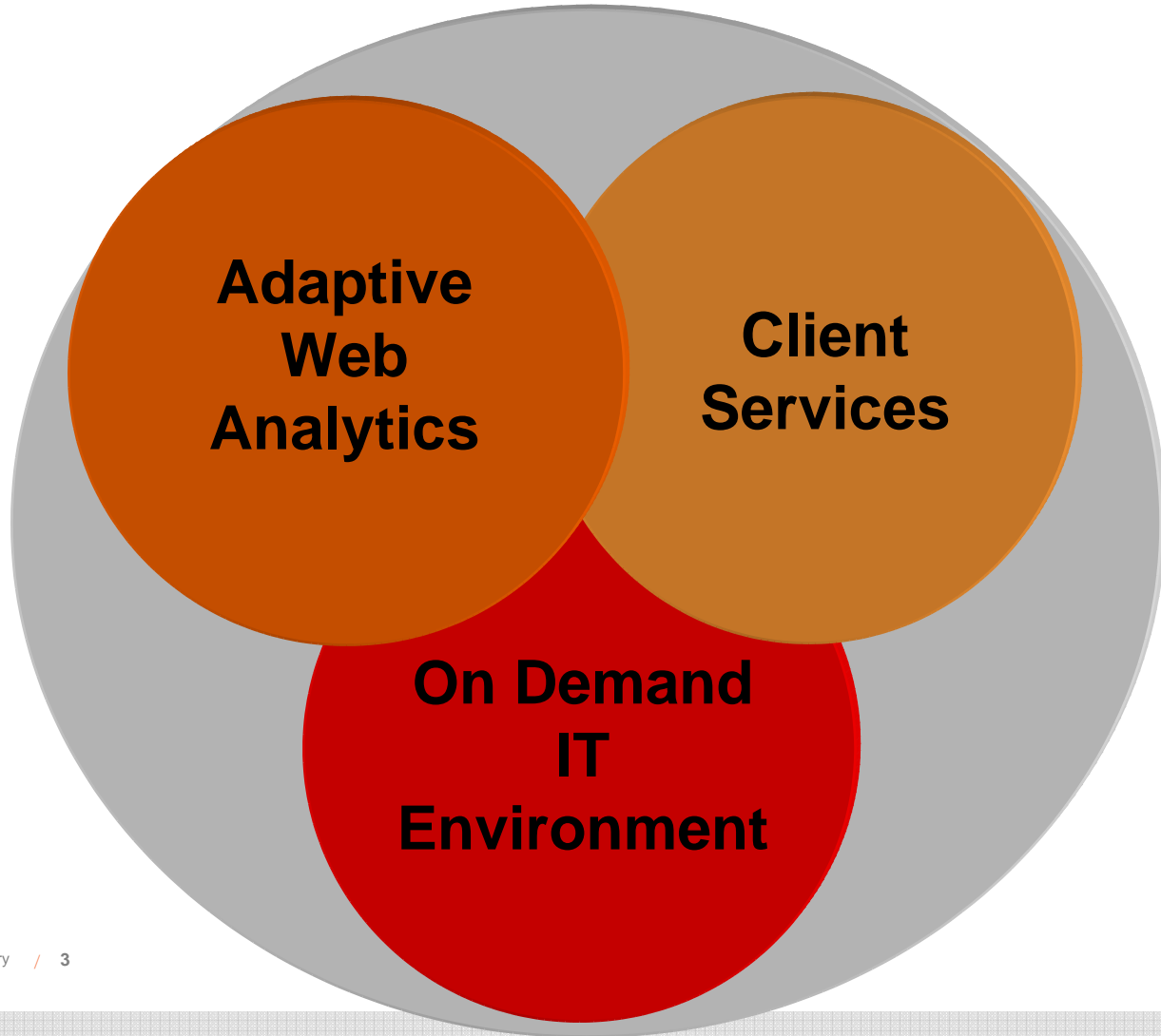
The screenshot shows a web browser window displaying a survey titled "Med Finance User Survey". The survey is on page 2 of 6. The form contains several sections with radio button options:

- 1. My primary responsibilities are**
 - CFO / CEO / COO
 - Patient Finance Services Director / Manager
 - Patient Finance Services Representative Biller / Collector
 - Revenue Cycle Department Head / Case Management / Patient Access / Medical Records
 - Financial Analyst
 - Technical Analyst
 - Other (please specify)
- 2. How long have you been...**
 - under 1 year 1 to 3 years 3 to 5 years over 5 years
 - at your current EMPLOYER:
 - in your current POSITION:
- 3. How long have you been using Medefinance?**
 - Less than 1 month
 - 1 month to 6 months
 - 6 months to 1 year
 - Over 1 year
- 4. On average, how much do you use per day:**
 - not at all 0 - 1 hours 1 - 3 hours over 3 hours
 - web applications at work to do your JOB?
 - the Internet at home for PERSONAL USE?
- 5. Which computer software and Internet websites do you find EASY TO USE?**

- **Fast facts about MedeFinance**
- Our survey process
- Key survey questions
- Surprises & Next time...

- **Founded** By Jim Quist in 1994
- **Who We Are** Web analytic software and client services provider
- **What We Do** Help financial executives improve performance
- **How We Do It** Our Performance On Demand Service
 - 1) Adaptive Web Analytics – personalized
 - 2) Instant, on demand IT environment and
 - 3) Client services – deep healthcare domain experience
- **Headquartered** Emeryville, CA
- **Ownership** Private, Profitable, 100% Growth Each of Last 3 Years
- **Clients** Over 400 hospitals...100% Healthcare Focused...

MedeFinance Performance OnDemand™



A Few MedeFinance Clients



- Fast facts about MedeFinance
- Our survey process
- Key survey questions
- Surprises & Next time...



1) Determine the Objectives

- Measure end-user satisfaction with services & product
- Measure the company's perception
- Gather input on future product enhancements
- Deepen knowledge about our user base
- Gain experience with direct user surveys

Week 1

Week 2

Week 3

Week 4

Week 5

Week 6

Week 7

Week 8

2) Establish Survey Goals

- 10 – 15 minutes to complete
- Response rate of 20 – 25%
- Complete in time for roadmap planning



3) Create Survey Questions

➤ 50 initial questions created for:

- User Profile
- Services
- Product Functionality
- Future Functionality
- Open Feedback & Optional Self Identification
- ~75% Quantitative vs. ~25% Qualitative



➤ Cross-functional team wrote questions

- Product Management / Client Services / Account Management / Executives

Week 1 Week 2 **Week 3** Week 4 Week 5 Week 6 Week 7 Week 8

4) Select Survey Engine

- There are many options on the market
- Key considerations:
 - Advanced Analysis
 - Anonymous Responses
 - Branching
 - Branding & Easy to Use
 - Cost
 - Email Distribution
 - Export Functionality
 - Graphics
 - Response Tracking
 - Unsubscribe/Remove

AdvancedSurvey[®]

inquisite[®]
web survey system

KeySurvey

QuestionPro.com
Real-time Professional Surveys...

©2005 MedeFinance. Co

SurveyMonkey.com
because knowledge is everything

webSURVEYOR[®]

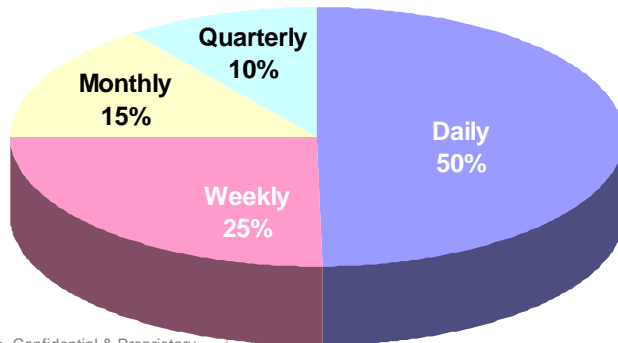
zoomerang

Week 1 Week 2 **Week 3** Week 4 Week 5 Week 6 Week 7 Week 8

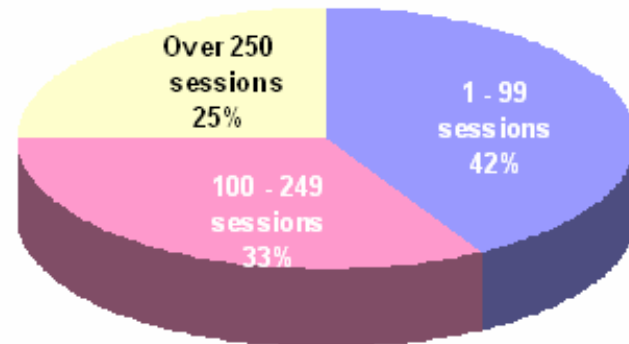
5) Target Users

- Frequent to infrequent users
- Recent to past users
- CFOs, Directors, Managers, Consultants
- **Gain customer stakeholders' permission!**

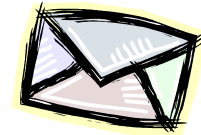
Targeted users logged in:



Number of times targeted users logged in:



6) Conduct Survey - Invitation



➤ Personalize email invitation from CEO

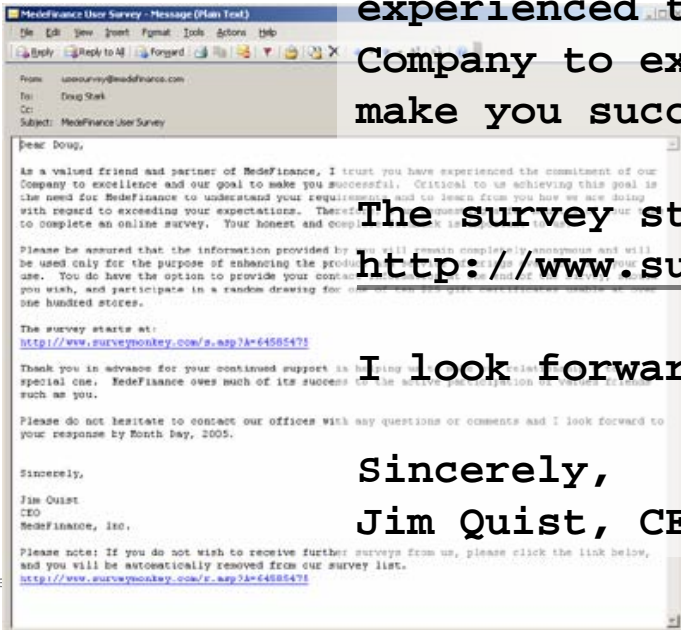
“As a valued friend and partner of MedeFinance, I trust you have experienced the commitment of our Company to excellence and our goal to make you successful...

The survey starts at:

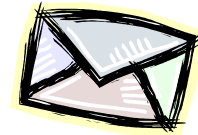
<http://www.surveymonkey.com/a...>

I look forward to your response by...

Sincerely,
Jim Quist, CEO



7) Conduct Survey - Reminder



- After 7 days, we experienced a response rate of 25%
- Reminder invitation to those who had not responded boosted response rate to 35%!

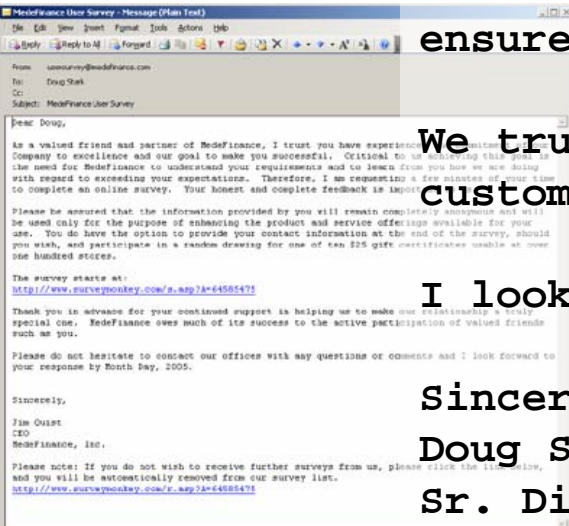
"Last week, Jim Quist, sent an online survey invitation...I want to follow up personally to ensure you receive this invitation..

We truly are shaping the product based on our customer's direct feedback...

I look forward to your response by...

Sincerely,
Doug Stark

Sr. Director, Product Management



8) Analyze Results

- Determine validity
- Compare averages/means
- Observe distribution
- Correlate results with conjoint analysis
- Use common sense...



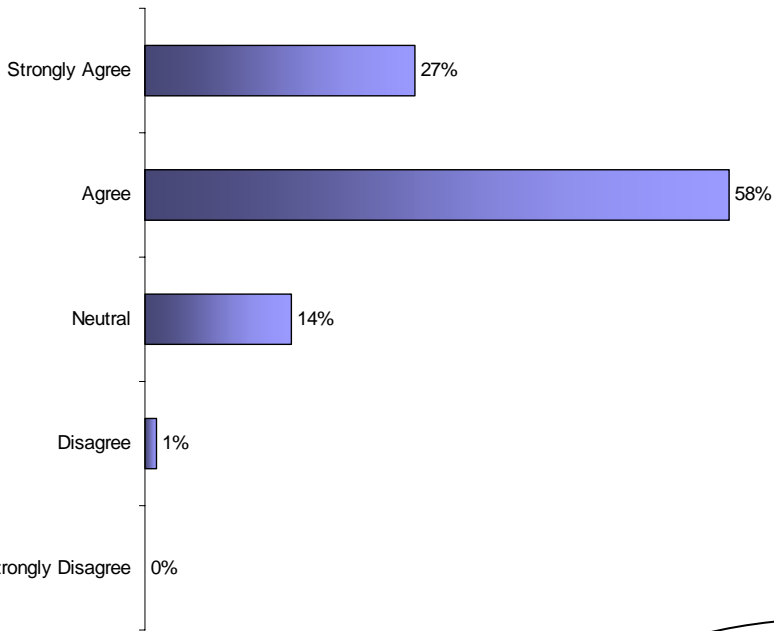
9) Report Results

- Share key results early!
- Don't make it a science project...
- Present results in actionable manner
- Publish by account, function, etc...
- Provide supporting detail for outliers
- Correlate key questions with supporting and/or opposing questions

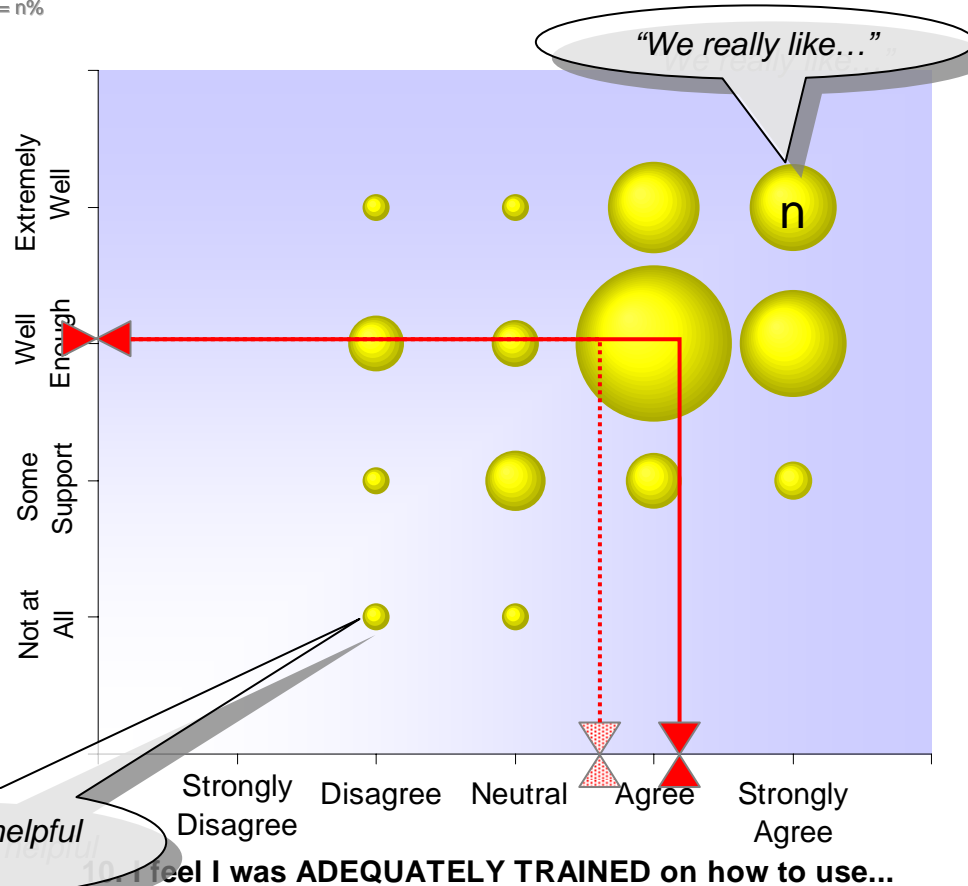


Week 1 Week 2 Week 3 Week 4 Week 5 Week 6 Week 7 Week 8

Example Results Graphs



9. How well do you KNOW HOW TO USE...?



10) Take Action



- Respondents expect action!
- Assign functional leads to create action plans for:
 - Immediate, Tactical, Strategic
 - Product vs. Service
 - By Functional Area
- Earn a strong future response rate by responding to respondents' feedback!

- Fast facts about MedeFinance
- Our survey process
- **Key survey questions**
- Surprises & Next time...

I would recommend MedeFinance to my colleagues and/or industry peers.

Strongly
Disagree



Disagree



Neutral



Agree



Strongly Agree



Overall how satisfied are you with MedeFinance?

Extremely
Dissatisfied



Dissatisfied



Neutral



Satisfied



Extremely
Satisfied



What is the one word that comes to mind when you think of MedeFinance?

Using MedeFinance helps my organization:

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
Benefit Statement #1	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Benefit Statement #2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Benefit Statement #3	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Benefit Statement #4	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please describe the most helpful aspects of MedeFinance.

1.
2.
3.

MedeFinance provides me with accurate data.

Strongly
Disagree

Disagree

Neutral

Agree

Strongly Agree



MedeFinance provides me with up-to-date, timely data.

Strongly
Disagree

Disagree

Neutral

Agree

Strongly Agree



How well do you know how to use MedeFinance?

- Not at all
- Need some support
- Well enough to do my job
- Extremely well

I feel I was adequately trained on how to use MedeFinance.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

MedeFinance is very easy to use and understand.

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please describe how MedeFinance can improve the service they provide

What additional features or capabilities would you like MedeFinance to provide?

1.
2.
3.
4.
5.

Please feel free to provide any additional comments and feedback.

- Fast facts about MedeFinance
- Our survey process
- Key survey questions
- **Surprises & Next time...**

The survey was a success!

- **Validation and reality check** - significant value can be achieved from a small group $n < 300$
- **Response rate** - reminders really do drive response rates
- **Customer affinity counts**
- **How much work it really takes**

Now that we have experience, next time we will...

- **Segment the survey** - ask the right questions to the right people
- **Quality over quantity** – perform more analysis with fewer questions. How will the answer be used?
- **Increase survey group size**
- **Seriously consider outsourcing!**

This was a helpful presentation.

- Strongly Disagree
- Disagree
- Average
- Agree
- Strongly Agree