

Running Successful User Surveys Surprises and Lessons Learned

April 6, 2005

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2. Profile - Page 2 of 6					14
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	using MedeFi	© nance?	Š	3	
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in your current POSITION? * 2. How long have you been J Less than 1 month J month to 6 months J 6 months to 1 year Over 1 year	o you use per	day:	0-1hours	1 - 3 hours	over 3 hours
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*3. How long have you been Jiless than 1 month Mediagonal t	o you use per o to your JOB? SONAL VSE?	day: not at all	20	3	3

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Today's Discussion

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



Fast Facts About MedeFinance

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

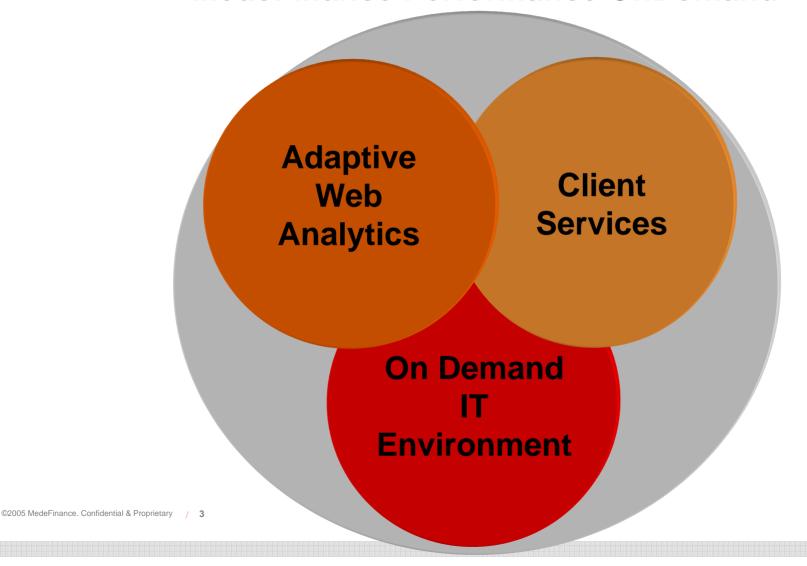
Clients

Over 400 hospitals...100% Healthcare Focused...



Service MedeFinance Offers

MedeFinance Performance OnDemand™





A Few MedeFinance Clients

































Medical Center













RIVERSIDE

























dukehealth







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Why survey?



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



What defines success?

2) Establish Survey Goals

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



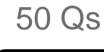


What's important to know?

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

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





35 Qs



How should we survey?

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







QuestionPro.com
Real-time Professional Surveys...







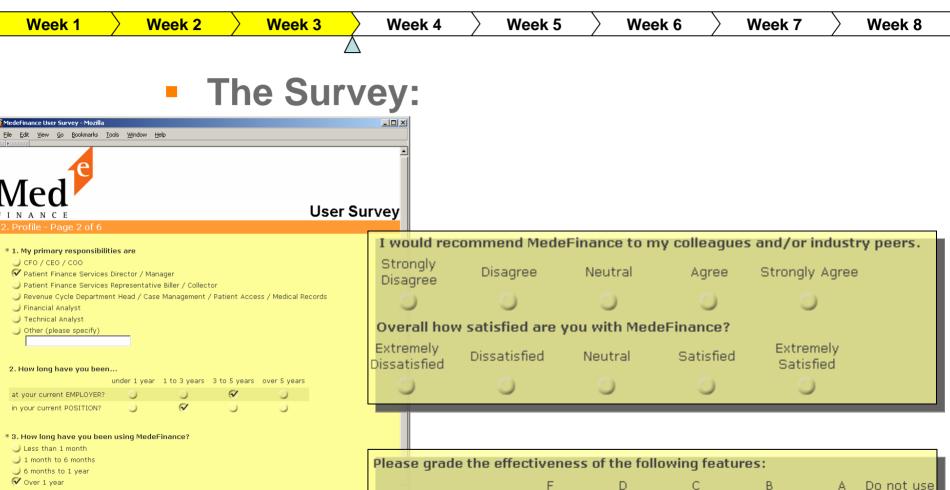


4. On average, how much do you use per day:

5. Which computer software and Internet websites do you find EASY TO USE?

web applications at work to do your JOB?
the Internet at home for PERSONAL USE?

Is it easy to read and use?



Reports & Charts

Pivot Reports

Drill Down to Details.

0 - 1 hours 1 - 3 hours over 3 hours



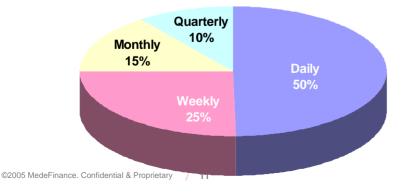
Who should we survey?

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

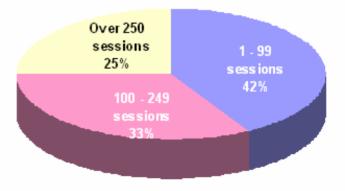
5) Target Users

- 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:





MesicFinance User Survey - Message (Plan Text)
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@2005 Me

Why is it important?

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

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...

Broly Breply to Al Groward 🔞 🐚 😼 🔻 👸 🥸 🗙 uppour endlandefeates con Down Stark make you successful... Subject: MedeFinance User Survey Dear Doug, As a valued friend and partner of RedeFinance, I trust you have experienced the commitment of or Company to excellence and our goal to make you successful. Critical to us achieving this goal is the need for Medefinance to understand your require with regard to exceeding your expectations. Therei The was survey starts at: be used only for the purpose of enhancing the product to provide your course http://www.surveymonkey.com/a... you wish, and participate in a random drawing for one hundred stores. The survey starts at: http://www.surveynonitey.com/s.msp?A=64585475 Thank you in advance for your continued support is Ing look in forward to your response by... much as you. Please do not besitate to contact our offices with any questions or comments and I look forward to your response by North Day, 2005. Sincerely, Sincerely, Jim Cuist Jim Quist, CEO SedeFinance, Inc. Please note: If you do not wish to receive further surveys from us, please click the link below, and you will be automatically removed from our survey list. http://www.surveymontey.com/r.asp?4=64686478



Did you forget?

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

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...

Search Medifinates Jose Survey

Dear Dougs,

As a valuand friend and partiser of Medification, I trust you have experience. We nite that you'll year are shaping the product based on our close and our goal to make you successful. Critical to us successfully use are shaping the product based on our state personal to see exceeding your experience and confidence and our goal to make you successful. Critical to us successfully your experience to understand your requirements and to learn from you have we nice boding with repeat to a requestion of see minutes of private the confidence to understand your requirements and to learn from you have we nice boding with repeat to the expectations. Therefore, I are requesting a few minutes of private the product of the provider of the pr

The study of states at:
The st

Sincerely,

Jim Coust.

CO

Board Stark

Please note: If you do not wish to receive further surveys from us, please clief to the life in t

and you will be automatically removed from our survey lim http://www.surveymontey.ocm/r.asp?4=64585471

Sr. Director, Product Management



What does it all mean?

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

8) Analyze Results

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





What is important?

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

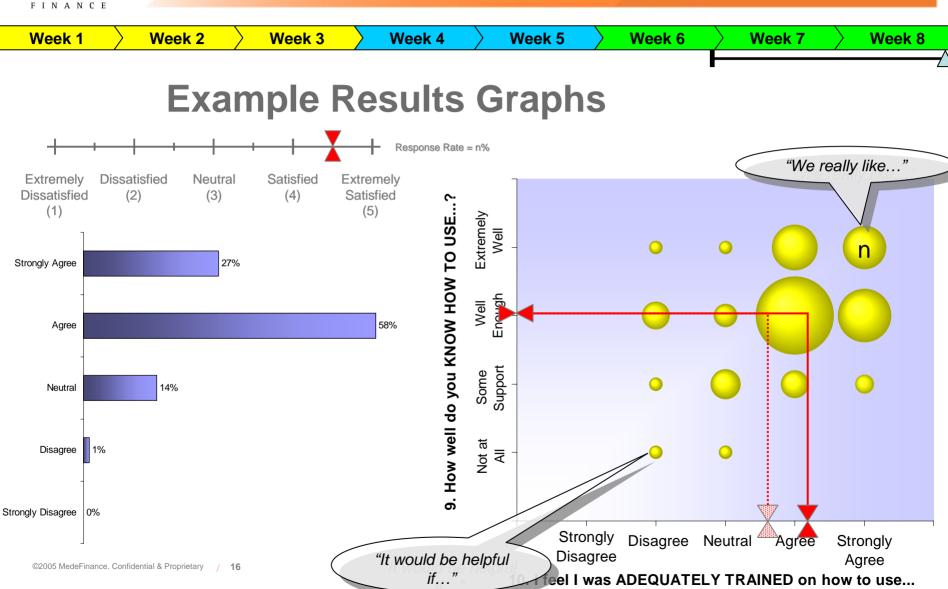
9) Report Results

- 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





How to publish the results?







Week 1

Week 2

Week 3

Week 4

Week 5

Week 6

Week 7

Week 8







- 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!



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Satisfaction

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree			
Overall how satisfied are you with MedeFinance?							
Extremely Dissatisfied	Dissatisfied	Neutral	Satisfied	Extremely Satisfied			
0	0	0	0				
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	0	0	0	0	0	
Benefit Statement #2	0	0	0	0	0	
Benefit Statement #3	0	0	0	0	0	
Benefit Statement #4	0	0	0	0	0	

Ple	Please describe the most helpful aspects of MedeFinance.					
1.						
2.						
3.						



Credible Results

MedeFinance provides me with accurate data.						
Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree		
0	0	0	0	0		
MedeFinance provides me with up-to-date, timely data.						
Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree		
0	0	0	0	0		



Usability & Training

How well do you know how to use MedeFinance?							
Not at all	◯ Not at all						
Need some	e support						
Well enough	gh to do my job						
Extremely	well						
I feel I was	adequately tra	ined on how t	o use Medel	Finance.			
Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree			
0		0	0	0			
MedeFinance is very easy to use and understand.							
Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree			
0	0	0	0	0			



MVQ - Most Valuable Questions

Please describe how MedeFinance can				
W	/hat	additional features or capa	bilițies would vou liķe Med	eFinance to provide?
	1.			
	2.			
	з. [
	4.			
	5.			
	,		-	
PI	leas	e feel free to provide any a	dditional comments and fe	edback.
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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.

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