



**BLUENOTES AMERICAS 2017**  
LOUISVILLE, KY • AUGUST 1<sup>ST</sup> - 4<sup>TH</sup> 2017

bluenotes  
*group*

explorance  
Improvement at heart.

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# We Heard You, Now What Happens Next?

## Bluenotes Community Update

## CSAT (Customer Satisfaction) Survey Results

Presented by Yeona Jang, MS, PhD  
EVP – Strategic Initiatives Office | eXplorance Inc.  
Adjunct Professor | McGill University



# Agenda

- **Community Updates**
  - Bluenotes conferences & regional workshops
  - Bluenotes group site
  - Community-led webinars
  - Upcoming events
- **What we have heard from you**
  - CSAT survey findings – FY16 and FY17
  - Acting upon the survey feedback
- **Discussion**
  - Specific changes to be sought, working together: What matters to Bluenotes community members



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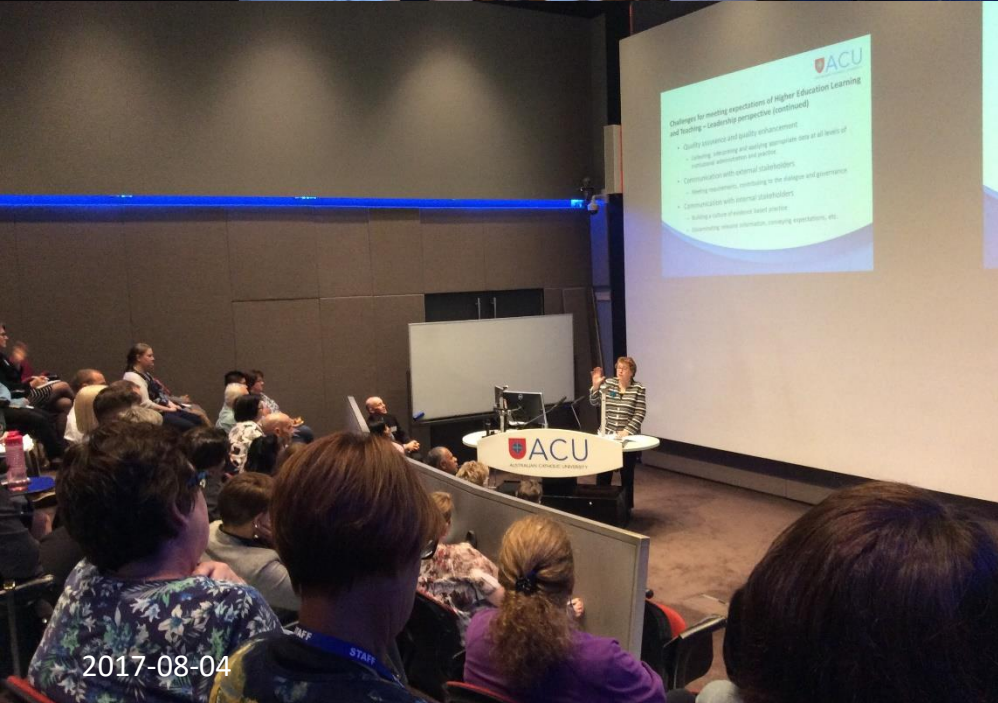
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# Bluenotes APAC 2017 (Melbourne, February)

## Theme: *The Bluenotes Community Learning through sharing*

- 33 attendees from 16 institutions in APAC areas
- Sharing of
  - the different approaches to achieving a successful implementation
  - the de-centralized experience by Donna Davis of James Madison University (North America), providing a thought-expanding moment for APAC users
- Prof. Anne Cummins (Deputy Vice-Chancellor – Students, Learning and Teaching at Australian Catholic University) invited the Bluenotes group
  - to join a presentation that she gave to ACU staff on the importance of student feedback in engaging students and improving teaching practice





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# User-driven Bluenotes Community Events in planning for 2018

- **Bluenotes conferences (Blue eXpert Camps planned)**
  - **EMEA**
  - **APAC**
  - **NA**
- **Bluenotes Community Regional User group Workshops**
  - **CIRPA, Toronto, Oct., 2017**
  - **More to come**





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# Online Bluenotes Community Site

- **Bluenotesgroup.com facelifting**
  - **Universal search**
  - **More info on training availability and registration**
  - **Learning and community-led webinars**
- **More to come**
  - **Integrating community forums for members to connect the community members with each other**
    - **Forum on the BNG site + Help Center Community page**
  - **Learning and Community-led webinars**





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# CSAT Survey: Background & Objectives

- **The specific objectives for the CSAT survey**
  - Understand overall client satisfaction with eXplorance
  - Measure client opinions in various areas including products, services offered, and staff competency
  - Identify specific areas needing actions for continuous improvement to better serve our clients
- **FY16 CSAT Survey**
  - In September 2016, eXplorance commissioned Infosurv Research, an independent research firm, to conduct FY2016 Client Satisfaction (CSAT) Survey.



# CSAT Survey: Rating scale and response rate

- Questions (excluding the industry standard 11-point NPS question) were posed with a 6-point satisfaction or agreement scale with a “Not Applicable” option.

Very Dissatisfied	Dissatisfied	Somewhat Dissatisfied	Somewhat Satisfied	Satisfied	Very Satisfied
Strongly Disagree	Disagree	Somewhat Disagree	Somewhat Agree	Agree	Strongly Agree

- FY16 CSAT Survey Response rate

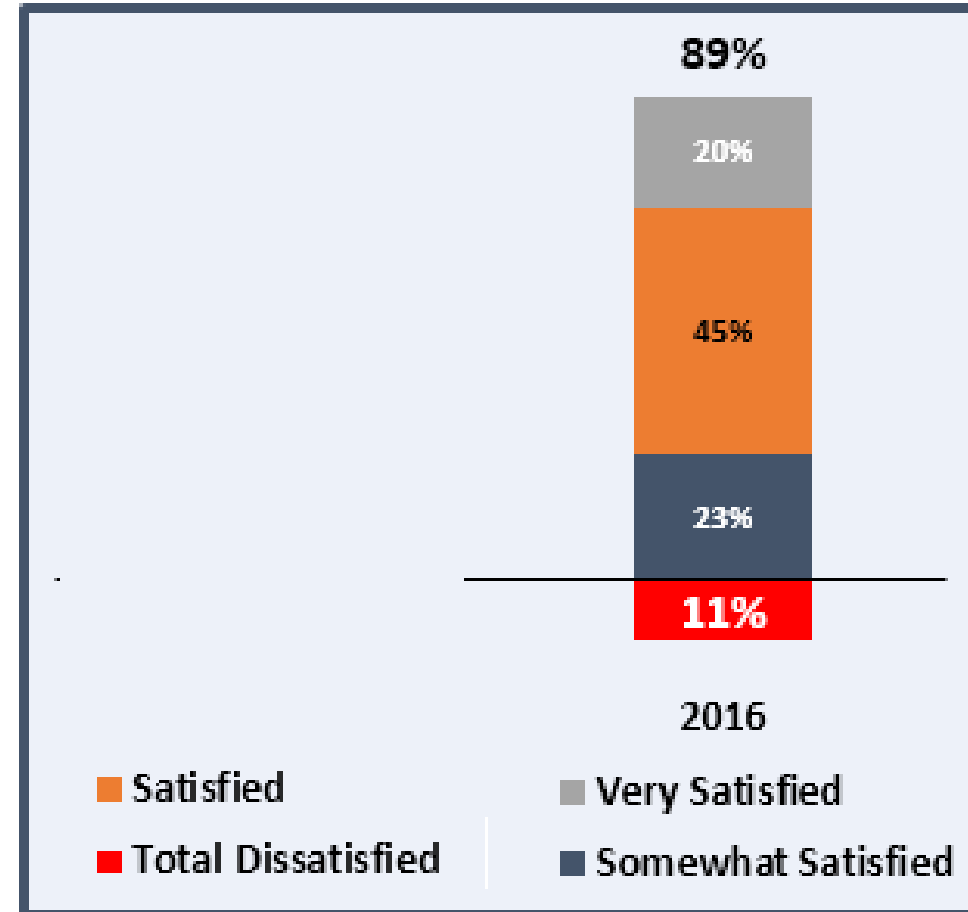
Final Respondent Counts	
126 (of 233) unique institutions	54% Institution Response Rate

# FY16 Overall Satisfaction

*How do you rate your overall satisfaction with eXplorance, its products and services?*

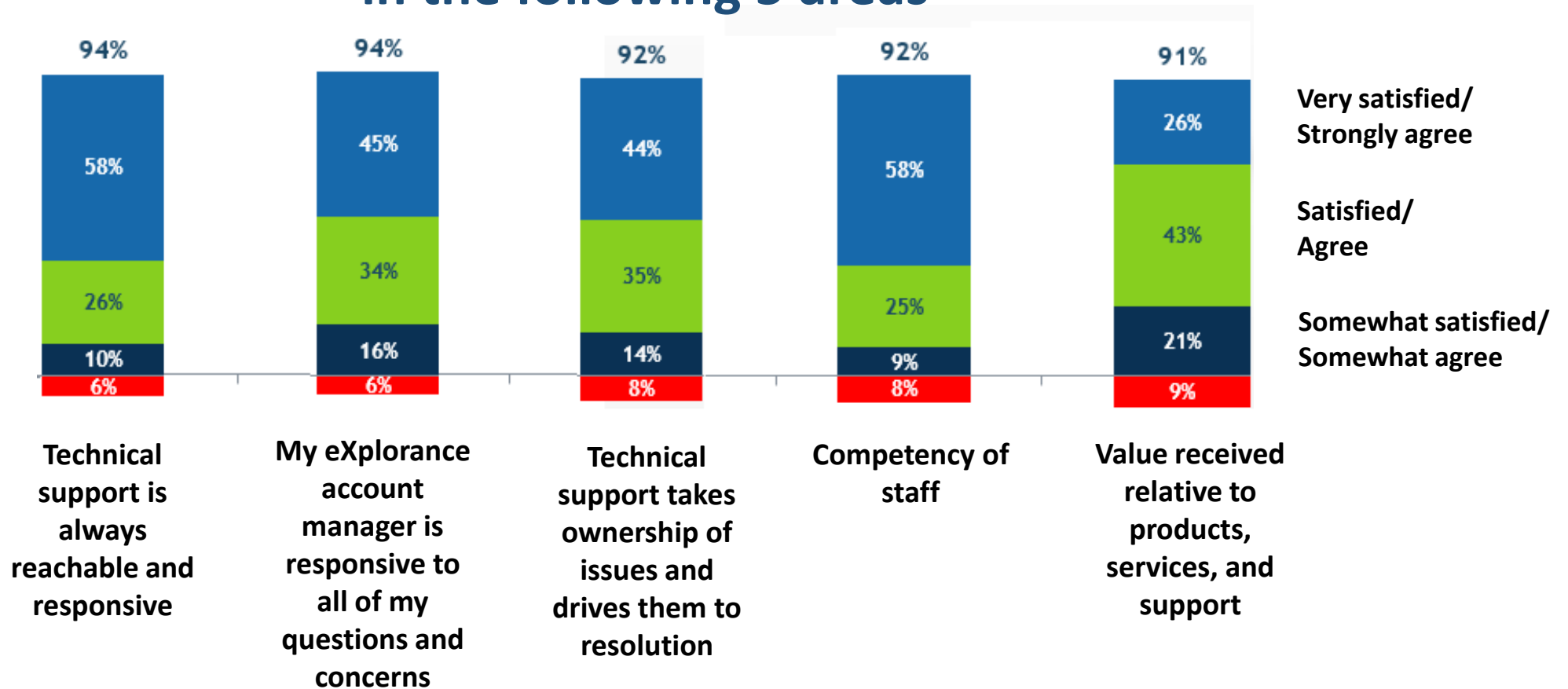
**Overall,**

- **89% of clients said at least “somewhat satisfied”**



# What we heard via FY16 CSAT Survey:

## 90%+ of clients said at least “somewhat satisfied” or “somewhat agree” in the following 5 areas



# What we heard via FY16 CSAT Survey: We need to work on the following 7 areas for improvement

89%



**FY16**

Features & functionality of eXplorance's products

88%



**FY16**

Our goals associated with our decision to invest in eXplorance products have been achieved

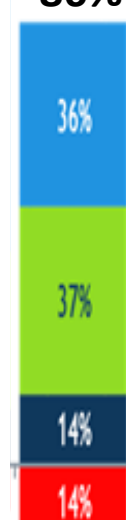
87%



**FY16**

Quality of eXplorance products

86%



**FY16**

My eXplorance account manager is proactive in contacting me about my use of the product(s)

85%



**FY16**

I am confident we are well-prepared to execute projects using eXplorance products on our own

83%



**FY16**

eXplorance understands my institution's specific needs

83%

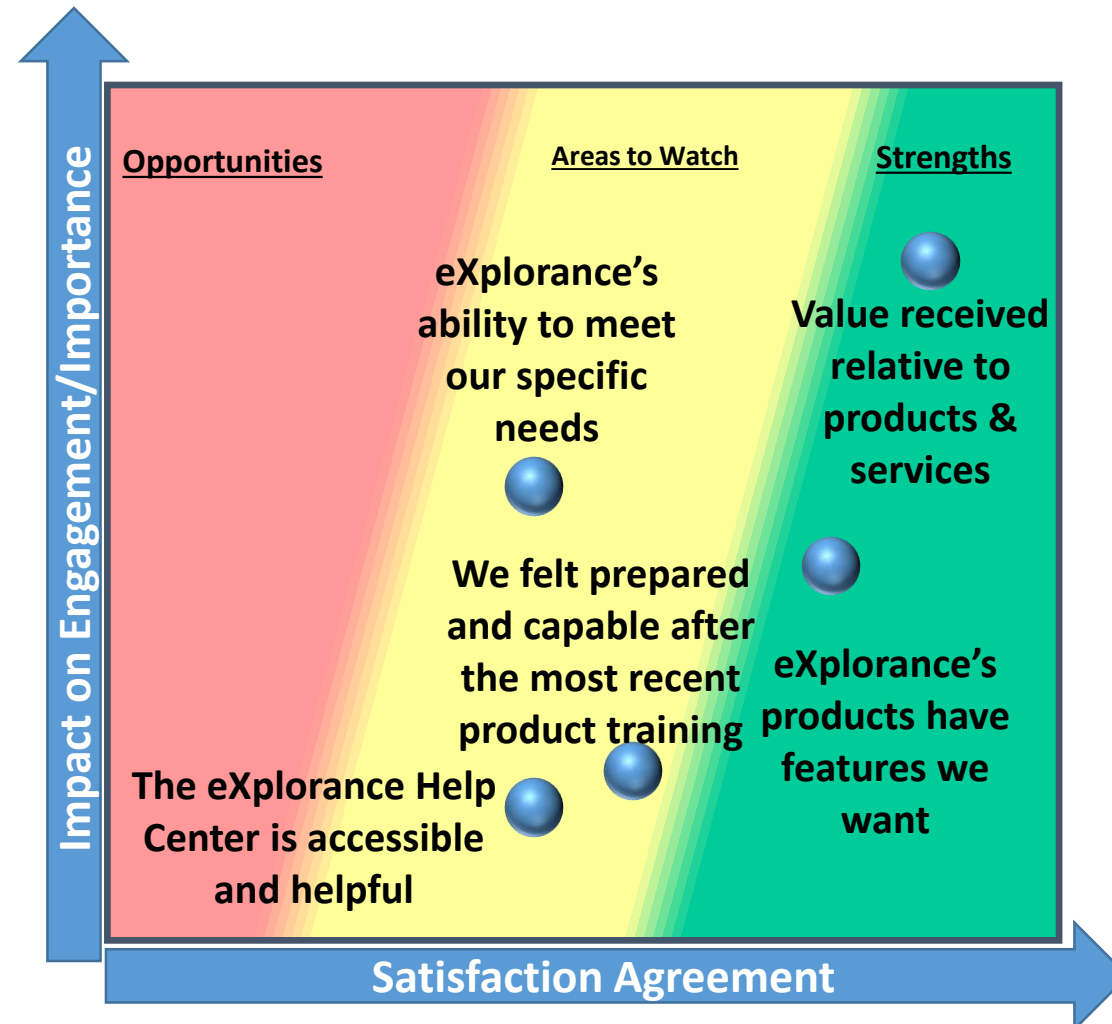


**FY16**

eXplorance Help Center, including knowledge base and user guide, is helpful

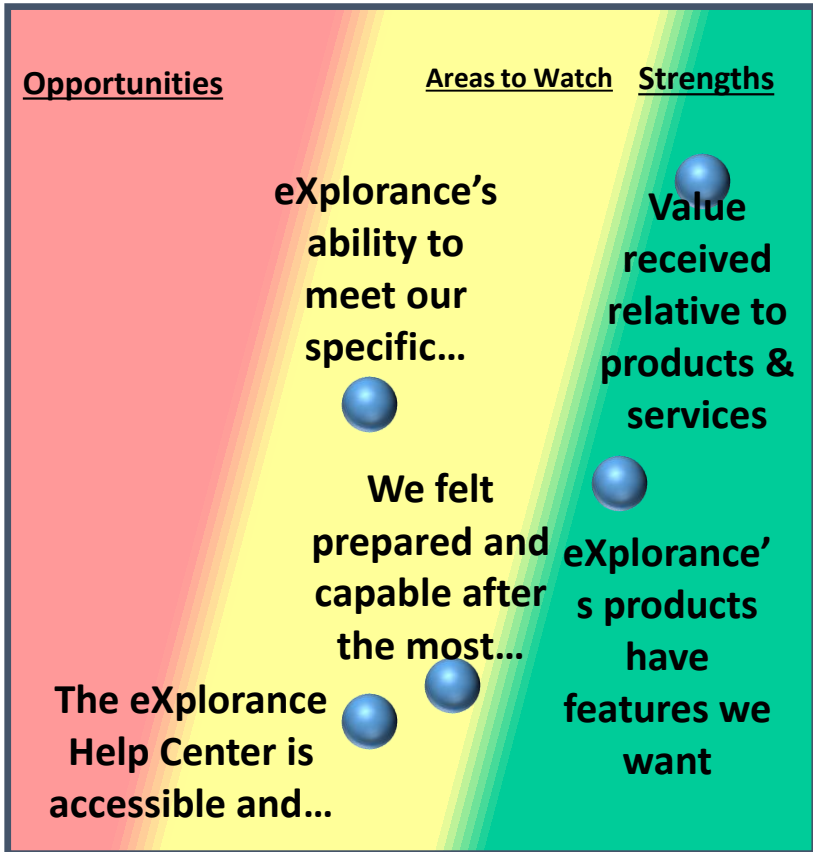
## What we heard via FY16 CSAT Survey: Key Driver Analysis

- A key driver analysis seeks to identify attributes that are most responsible for driving customer satisfaction.
- **Two key driver attributes** are classified as key strengths (in the green shaded area). These are highly responsible for driving high overall satisfaction.
- The **three areas** have lower ratings and are key priorities for improvement.





Impact on Engagement/Importance



Satisfaction Agreement



# Actions Taken:

## eXplorance's ability to meet our specific needs

- Increased dedicated customer relationship managers
  - Engage clients through detailed loyalty calls to better understand the needs, the use of the products, and challenges
  - Liaise with internal departments to advocate on behalf of customers,
  - Present and discuss new features to help customers maximize the use of the products
- Operationalized 24/7 customer support

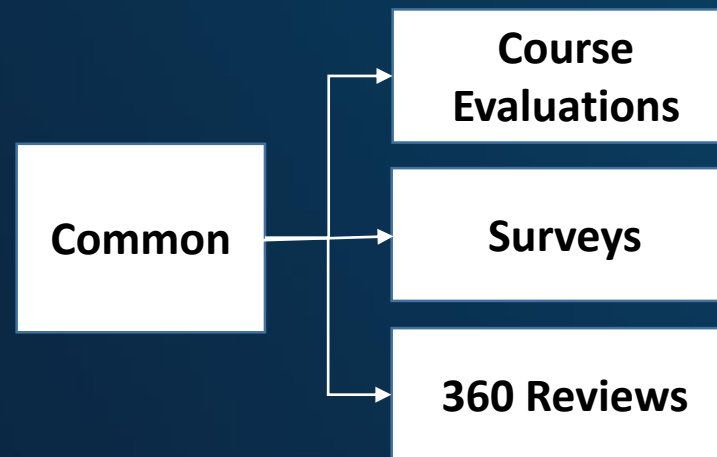


# Actions Taken

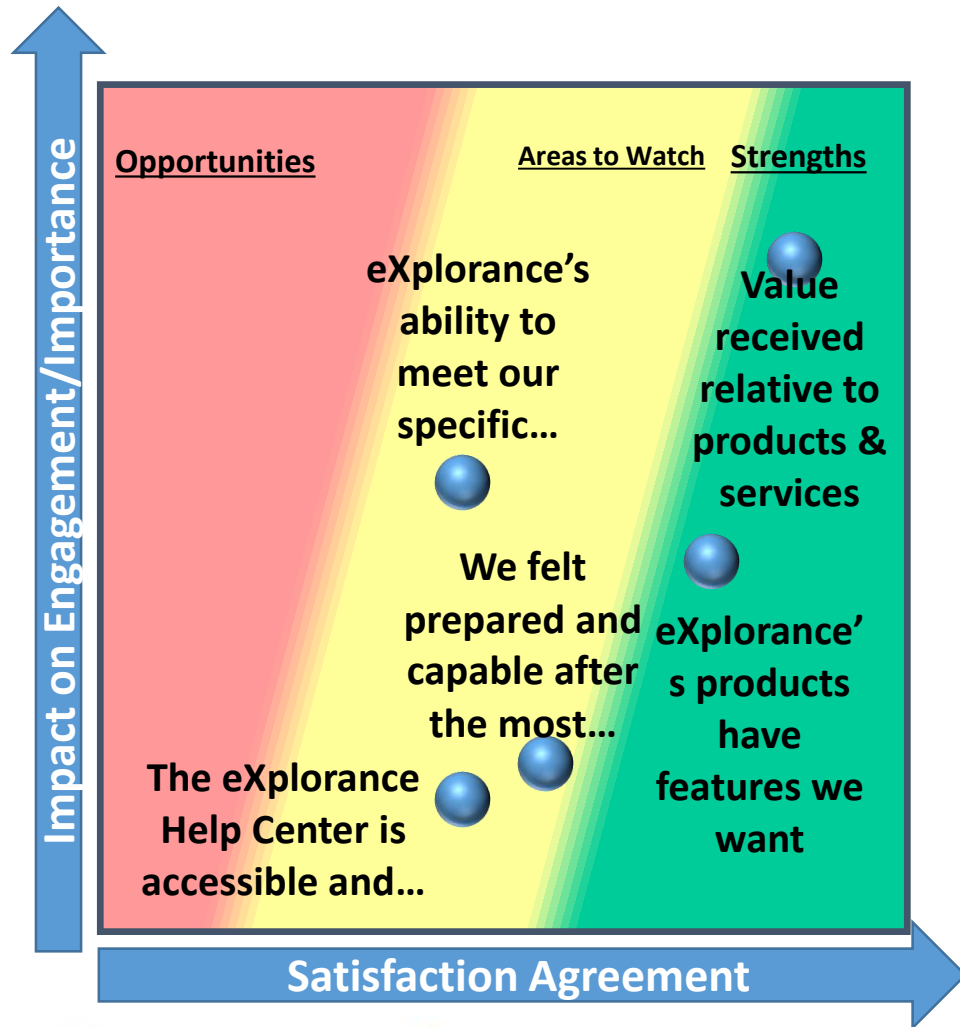
## Blue Administrator Certification Training Program

- So far, 189 Blue admin certified
  - 93 institutions with at least one Blue admin certified
- Revamped the content and the structure, first executed in the instructor-led session in March

### – Modularized



- More follow ups to accelerate the learning curve
- Continuously improving based on the feedback



# Acting upon the feedback

## Help Center User Guide

- [help.explorance.com](http://help.explorance.com)
- Implemented universal content search, integrating articles and user guide (formally called product documentations)
- Improved look and feel for more intuitive and easier navigation
  - User guides around the feedback process components
    - Preparing data
    - Launching
    - Monitoring
    - Analyzing/distributing



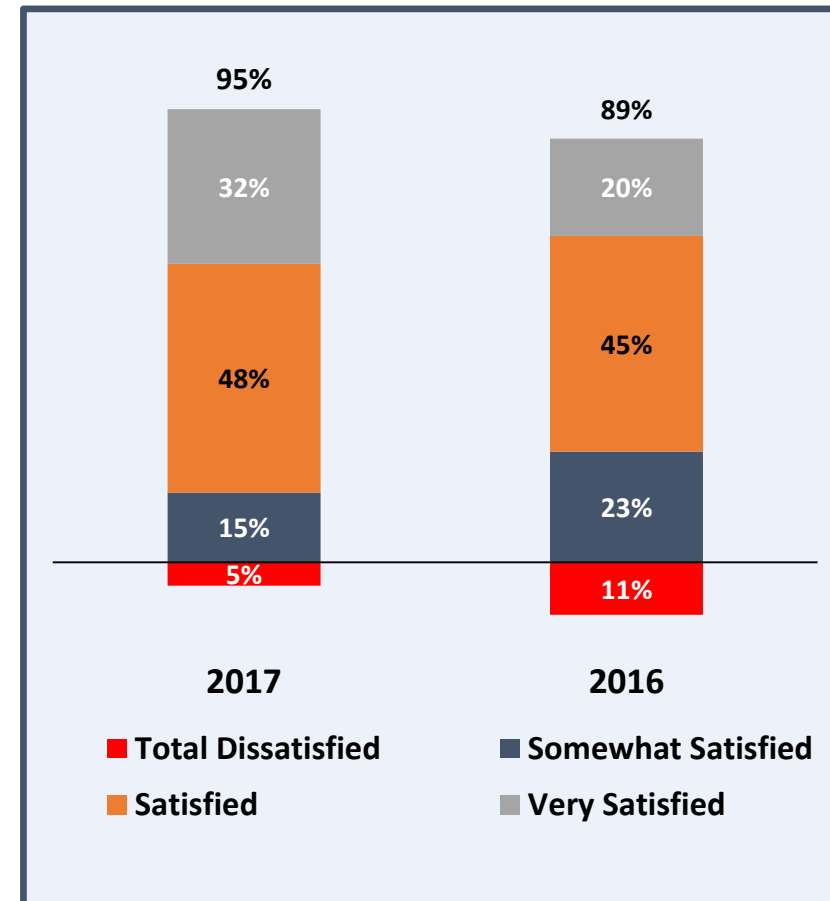
# FY17 Overall Satisfaction

*How do you rate your overall satisfaction with eXplorance, its products and services?*

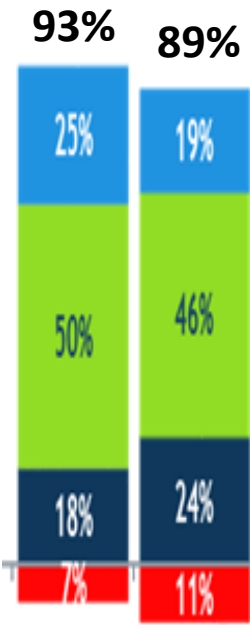
**Conducted by Infosurv, May, 2017**

**Overall,**

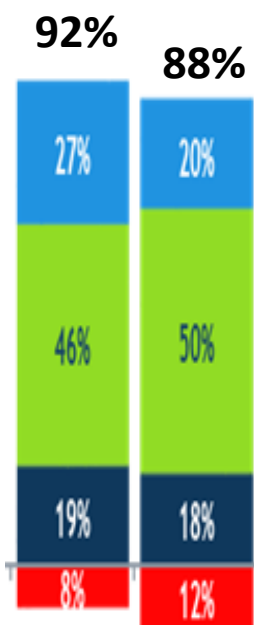
- **95% of clients are at least “somewhat satisfied”**



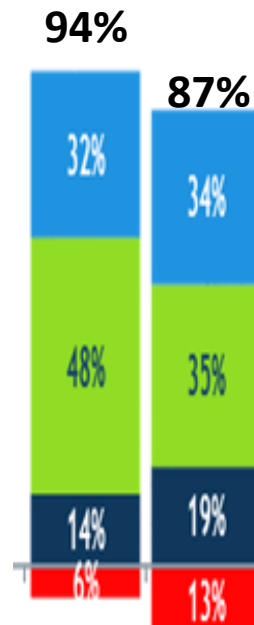
# FY17 CSAT Survey findings in the 7 areas that we took actions



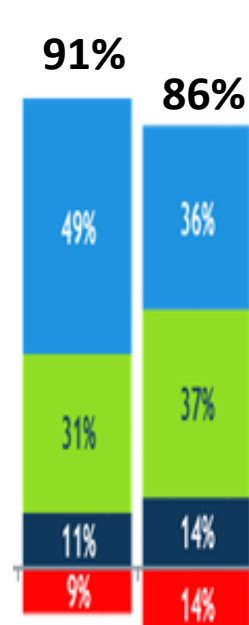
**FY17 | FY16**  
Features & functionality of eXplorance's products



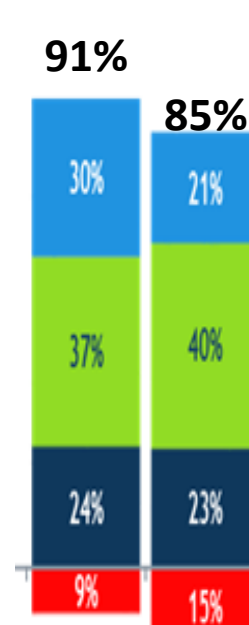
**FY17 | FY16**  
Our goals associated with our decision to invest in eXplorance products have been achieved



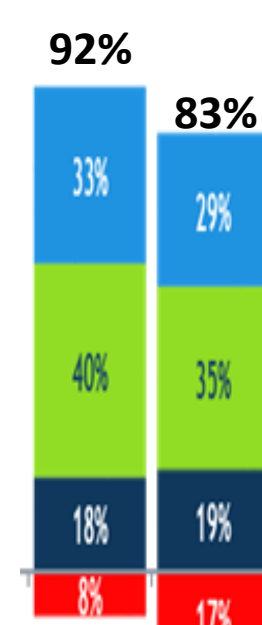
**FY17 | FY16**  
Quality of eXplorance products



**FY17 | FY16**  
My eXplorance account manager is proactive in contacting me about my use of the product(s)



**FY17 | FY16**  
I am confident we are well-prepared to execute projects using eXplorance products on our own



**FY17 | FY16**  
eXplorance understands my institution's specific needs



**FY17 | FY16**  
eXplorance Help Center, including knowledge base and user guide, is helpful

# What we heard via FY17 CSAT Survey: Key Driver Analysis

- Based on the key driver analysis, **the top priority** for eXplorance going forward is to improve clients' ability to use eXplorance products on their own.
- **Two areas provide secondary opportunities** for improvement:
  - Value received from products, services, and support
  - Clients' ability to achieve goals associated with their decision to invest in eXplorance's products



## FY18 continuous improvement planning in progress, acting on FY17 CSAT feedback.



- CRM , community, and customer governance
  - To continue enhancing interactions with the customers to ensure the customers' needs are met with the increased confidence in executing projects using eXplorance products on their own
- Training
  - Content quality improvement
  - Global availability improvement with follow-ups
- Learning and community led webinars
  - 1 learning webinar per month, per region
  - 1 community-led webinar per month
- Help center
  - ease of use
  - Articles update



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# Discussion

- **Specific changes to be sought:  
What matters to Bluenotes  
community members**



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# Thank you!

For any question,  
additional information,  
and/or suggestions,  
contact [yjang@explorance.com](mailto:yjang@explorance.com)



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# Bluenotes Group site

bluenotes group

FORUM ▾ EVENTS ▾ WEBINARS ABOUT US KNOWLEDGE BASE 🔍 SEARCH

UNIVERSITY OF LOUISVILLE **Happening now!**

## Bluenotes Americas 2017

📍 The Brown Hotel, Louisville, KY 📅 Aug 1st - Aug 4th ⚠️ Registration Closes July 14, 2017

***This year's Bluenotes Americas Conference theme is 'Higher Education in the 21<sup>st</sup> Century: Using Data to Respond to Opportunities and Challenges'.*** Join us and other Blue enthusiasts for this three-day conference to connect, share expertise, and learn from best practices.

[Reserve your spot today!](#)

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WELCOME. BLUENOTES AMERICAS 2017 IS NOW HAPPENING!

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# Help center

**eXplorance Help Center**  
Join the community, search the knowledge base, submit a request, and more.

Search

Connect	User Guide			Updates
<b>Connect with the Community</b> 	<b>Getting Started</b> 	<b>Preparing the Data</b> 	<b>Launching the Feedback Process</b> 	<b>News</b> FR UNIGW Sydney Deploys Leading-edge Technology for Course Schedules FR Help Center Upgrade - May 2017
<b>Contact the CEO</b> 	<b>Analyzing/Distributing the Results</b> 		<b>Monitoring the Feedback Process</b> 	<b>Training Info &amp; Schedule</b> 
<b>Access Learning Webinars</b> 	<b>Configuring the Blue System</b> 	<b>Integrating Blue with Other Systems</b> 	<b>evalUT Resource Manual</b> 	<b>Release Notes</b> 
				<b>Downloads</b> 