

The JF North America "CRM" (Customer Relations Management Software) team is sending this survey to all federations who are/were scheduled for implementation between 2017 and 2019. Past go lives have indicated a need to reassess the marketing assignment process.

We seek your opinion about this part of our CRM training program. This survey has five short sections, which should take less than 7 minutes to complete. Your answers will help us improve the process moving forward. The ideas and choices in this questionnaire are based on observations in the training/go live process, verbal feedback from Federations, and completion statistics.

This survey's purpose is to gather details about your experience implementing the CRM marketing module. Only you and the other participants of these sessions can provide us with the needed information.

Please respond to the below survey and use the submission arrow on the bottom by Sunday 9/30/18 at 11 pm Eastern time. We appreciate your time completing this survey. Thank you in advance for your contribution to the collective.

## Section 1

On average how much time did you spend completing the assigned activities each week? [Actuals, Behaviors]

- ☐ less than 10 minutes
- ☐ between 11 minutes and 59 minutes
- ☐ Between 1 hour and 3 hours

How important is it to your organization to complete the following marketing assignments for go live?

[Belief; Optimals]

	Extremely important	Very important	Moderately important	Slightly important	Not at all important
Finder Numbers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Source Codes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Appeals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Vendors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Creatives/Packages	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Name Formatting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Export Definitions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ask Ladders	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Seeds	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Selections/Segments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Acquisition Lists	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Creating a Test Marketing Effort	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

How did you feel about the assignments given after each training session? [Feelings]

Mark the following based on difficulty completing the task within the marketing functional area. (Reminder: the task is to obtain a list of items, create them in your own database, and take screenshots). Let the number 1 indicate the area in which you have the most problems completing and number 5 to indicate the least problematic component of completion. [Actuals; Beliefs]

	1 - Most Difficult	2- Difficult	3 - Neutral	4 - Easy	5 - Very Easy
Appeals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Finder Numbers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Source Codes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Vendors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Name Formats	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Selections/Segments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Creatives/Packages	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Export Definitions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Creating a Test Marketing Effort	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Seeds	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ask Ladders	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## Section 2

Reflecting upon what was learned in training, what should be added **first** when adding a source code to the system? [Actuals; Knowledge]

- ☐ Source Code Part
- ☐ A Source Code Layout
- ☐ A Package
- ☐ A finder number based on algorithms

Based on your marketing training, to the best of your knowledge, please identify to the items that are required and which are optional when completing a marketing effort in CRM.

To do so drag each marketing area on the left to either "optional" or "required" into the right top/bottom box. [Actuals; Knowledge]

Items	Optional	Required
Appeals		
Finder Numbers		
Source Codes		
Vendors		
Packages		
Creatives		
Export Definitions		
Ask Ladders		
Segments/Selections		
Acquistion Lists		
Seeds		
Name Formatting		

### Section 3

What percentage of each assignment did your federation complete in the the following marketing areas? [Actuals; Behavior]

	0-24% completed	25-80% completed	81-99% completed	100% with screenshots completed
Appeals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Source Codes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Finder Numbers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Vendors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Packages/Creatives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Name Formatting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Export Definitions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ask Ladders	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Seeds	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Segments/Selections	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Acquisition Lists	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Creating a marketing test effort	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

In regards to challenges you've encountered while completing the marketing module assignments, mark your level of agreement to each statement. [Causes, Feelings]

	Strongly agree	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree
The assignment instructions were confusing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I understand the assignment, but I don't understand the CRM system adequately enough to complete	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If I had more time between assignments I could complete in the required time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If I didn't have other implementation priorities I could complete assignments in the required time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other <input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please rate your federation for each statement. Five stars indicate your Federation has excelled in that area. A mark of zero stars indicates the lowest level of achievement for that statement. (Please remember this survey is to help JF North America be able to serve Federations better by understanding Federation needs/dynamics). [Feelings; Attitudes]

Your confidence in  
creating realistic  
marketing efforts for your  
Federation before go live  
(and after training)

The likelihood your  
marketing effort will  
be/was entered into the  
new system at go live.

Your desire to complete  
the marketing  
assignments on time

Your understanding of the  
marketing module setup  
before go live

What challenges have you encountered internally while your Federation attempted to complete marketing assignments (e.g. business process decisions, group dynamics, lack of needed information from other colleagues, etc.) [Actuals; Causes]

How useful were the following resources in post training activities? [Actuals; Feelings]

	Extremely useful	Very useful	Moderately useful	Slightly useful	Not at all useful	Was not aware resource existed
Examples from other Federations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
PowerPoint Training slides	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Blackbaud User Guides	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Recorded training sessions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Step by step assignment guide	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other <input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

#### Section 4

What can JF NorthAmerica's implementation team do differently to ensure participants complete the marketing assignments? [Solutions; Beliefs]



Do you think sharing your lists in the chat box during each webinar would have helped your team be able to complete the assigned tasks? [Solutions; Attitude]

- ☐ Yes
- ☐ No

## Section 5

How many members of your team were involved in completing the marketing assignments? [Demographics]

- ☐ 1
- ☐ 2-3
- ☐ 4-5
- ☐ 5 or more

What month was/is your scheduled to go live date? [demographics]

- ☐ January
- ☐ February
- ☐ March
- ☐ April
- ☐ May
- ☐ June
- ☐ July
- ☐ August
- ☐ September
- ☐ October
- ☐ November
- ☐ December

What year is/was your schedule go live date? [demographics]

- ☐ 2017
- ☐ 2018
- ☐ 2019



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