Background

Large companies, organisations, government departments and councils all have a lot of functions that help them operate. These functions include things such as Human Resources, Finance, Internal Audit, Communications, Risk Management etc.

We have currently identified 19 such **functions**:

1. Audit
2. Business Continuity
3. Communications
4. Compliance
5. Finance
6. Procurement
7. Projects
8. Risk
9. Talent (Human Resources)
10. Business Planning
11. Continuous Improvement
12. Decision Making
13. Organisational Change (Transformation)
14. Privacy
15. Cultural Diversity
16. Customer Centricity
17. Health & Safety
18. Vision & Values
19. Wastage

For our own purposes and to place these functions into appropriate groups, we have further sorted these 19 functions into 3 groups:

|  |  |  |
| --- | --- | --- |
| BUSINESS FUNCTION | BUSINESS ACTIVITY | BUSINESS CULTURE |
| 1. Audit 2. Business Continuity 3. Communications 4. Compliance 5. Finance 6. Procurement 7. Projects 8. Risk 9. Talent (Human Resources) | 1. Business Planning 2. Continuous Improvement 3. Decision Making 4. Organisational Change (Transformation) 5. Privacy | 1. Cultural Diversity 2. Customer Centricity 3. Health & Safety 4. Vision & Values 5. Wastage |

Outcomes

We know that in a lot of organisations, there is inefficiency and misunderstanding. This often happens at all levels within a function.

We want to able to look at a clients business and through a survey of some (or all) of their functions, highlight where the function is not working, or some inefficiency exists.

We also want to be able to repeat the set of surveys completed by a client at a later date, so we can make comparisons and assess if improvement has been made.

By aiming to keep the surveys as standard as possible, we also aim to be in a position to compare clients results with other clients results. Once we have enough clients, we should be able to paint a picture of how others in a similar industry all rate their business functions – this relies on keeping the surveys standard however so I can make fair comparisons

How We Want To Do This

We want to achieve this by conducting surveys of a clients business.

There will be two types of survey completed:

1. **General** Survey

The General Survey is a single survey that is sent to a client. The client ensures the link is sent to all staff in their business. All staff select the link, are taken to an online survey which they complete.

The general survey will ask 2 or 3 questions for each of the 19 functions (audit, business continuity etc.)

All the responses are captured in my database. I can then pull this data out of the database in the form of an excel file and undertake some offline analysis and reporting.

Should the general survey identify a business function(s) that are not working well, we can complete a targeted survey for that specific function. E.g. If the general survey said 18 of the 19 functions worked well, but it highlighted that the Audit function wasn’t working well, we can then conduct a targeted survey on the audit function.

In essence, the general survey is a way to help identify what functions to do a targeted survey on

It is possible however that a client could have offices / branches spread nationally or globally that replicate some or all of the 19 functions. So if this is the case, I want to be able to create a new client and then if appropriate, create branches for this client. Each branch would need a unique ID which is linked to the main client ID – so I can assess responses by branch as well as the organisation as a whole (which includes all the branch results)

1. **Targeted** Survey

The targeted survey is a more detailed assessment of any combination of business functions.

The general survey may identify that a client has problems with their audit, risk, finance and privacy functions. In this case, the client would ask for 4 targeted surveys – 1 for each of the 4 areas identified. In this example - audit, risk, finance and privacy.

The targeted survey aims to look at a function and seek the views of people involved in the function or a customers of it.

We also aim to repeat the surveys for a client every 6 months or 12 months. So they can see progress against the baseline of the first survey.

So for each targeted survey we will ask 4 groups of people a set of questions. These groups are:

* Level 1 (Executive Management – Tier 1 and 2)
* Level 2 (Senior Management – Tier 3 and 4)
* Level 3 (Mid Management and below – Tier 5 +)
* Level 4 (Customers – Internal users of the function)

When a client purchases a targeted survey (In this example - audit, risk, finance and privacy) they will supply a list of names and email address for each level for each of the 4 targeted surveys. E.g.:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Level 1 | Level 2 | Level 3 | Level 4 |
| Audit | Name & Email  Addresses | Name & Email  Addresses | Name & Email  Addresses | Name & Email  Addresses |
| Risk | Name & Email  Addresses | Name & Email  Addresses | Name & Email  Addresses | Name & Email  Addresses |
| Finance | Name & Email  Addresses | Name & Email  Addresses | Name & Email  Addresses | Name & Email  Addresses |
| Privacy | Name & Email  Addresses | Name & Email  Addresses | Name & Email  Addresses | Name & Email  Addresses |

The names and email addresses in each of the above boxes may be the same, or different but relate to the specific function. So for instance for the 4 functions shown, I would image the names and emails supplied by the client would mostly be the same

However the names and emails supplied for Level 3 would be different – because the client would have an audit team, a separate risk team, a separate finance team etc.

By asking the same question from 4 different perspectives, we aim to find where the failures / inefficiency exists. E.g. in the above example, for the targeted audit survey, Levels 1, 2 and 3 may all think the audit function is working well. But level 4 (the internal customers / users of the audit function) might think it is not working well for them at all and needs to be changed so it is effective.

With names and email addresses added into the clients account in the appropriate places, I want to be able to send a link from the admin panel to the respondents. This will be in a template form with a link that relates to the client and level the respondent is at.

In this example, each respondent would get 1 email with 1 link in it.

That link would open the online survey form that would list all the questions to be answered. E.g. A level 1 respondent would get 1 email with 1 link. The online survey would have 4 pages (1 for audit, 1 for risk, 1 for Finance and 1 for Privacy). The survey would show the only the questions asked of level 1 respondents for each of the 4 functions

All responses are saved in a structured way in my database so I can pull out and analyse data individually, or as a group, or by wider industry. The analysis of data and reporting of results will be done offline

Website

The website will be a brochure style website. Approx. 4 to 5 pages.

It will have no e-Commerce functionality

The business is a professional, corporate consultancy, so has to reflect a corporate professional look and feel. To do this it will need to be minimalistic, crisp and sharp with some innovative / clever design features that reflect professionalism.

The “look and feel” design work to be completed, also includes the development of a corporate logo

I have a Google analytics account set up for this project, so want the appropriate coding from this to be dropped into each page.

An ability to edit the content of the website

‘Request more information’ space on the website, where a user can enter some basic details and submit which both notifies me of a contact request, but also creates a shell user profile for the client.

The website is just a sales / marketing / promotional tool, so people visiting the site cant access surveys etc.

Admin Panel

The admin panel is only accessible by me, or those I authorise to have access and is accessed by username and password authentication

Admin panel is divided into 4 parts:

1. Admin Management

This is for me to add / delete / edit users who will have access to the admin panel.

I am the only person who can add / remove / edit users

All added users however will have full access to all functions (with the exception of adding / removing / deleting other admin panel users)

* Add General Survey master list
* Add Target Survey master list
* Remove / edit content in the general or targeted survey master list

1. Client Management

Client management is where I can manage the clients I have and the details I hold about them. I see this as just about setting up the client – not for organising what survey, or when surveys will be sent etc. Functions I imagine in this space

* Add / Remove / Edit clients (includes address details, contact people, phones, emails etc.)
* Add / Remove / Edit Branches to a client (if applicable) (incl. branch details, address, phone etc.)
* ‘Contracts’ tab that allows me to upload and store related documents (contracts, invoices etc.)

1. Survey Management

Survey management is where I can manage what surveys the client will answer and also personalise the survey questions if required. Functions I’d imagine necessary in this space

* Add general or targeted survey(s) to client
* Remove general or targeted survey(s) from client
* Edit general or targeted surveys. Any editing only apply to the specific client
* Add / remove / edit dates and frequency of surveys to be conducted
* Generate survey links for general or targeted surveys
* Send template email to a client with appropriate survey links

If a general survey, just one email to designated contact who would forward to respondents

If a targeted survey, an individualised email to all respondents with the link for their level

* Upload names / email addresses to specific clients surveys
* Add / Remove / Edit names or email address to a clients list of surveys
* For each client, track progress (e.g. surveys sent, surveys opened, surveys completed etc.)

1. Response Management

Response management is about how I manage the responses received after respondents have completed the surveys sent to them.

A key aspect of this is maintaining the data received so it can be extracted and analysed in a meaningful way.

If for example, a client has branches that are answering the surveys as well, I want to be able to see each branches responses individually. So I can analyse results by branch, or by the organisation as a whole.

As such the way responses are captured, stored and maintained is critical to this whole project.

I imagine the following base requirements:

* Select client to view
* View responses for that client
* If client has answered the survey more than once, responses need to be grouped by date completed
* Export responses to excel (either .xlsx or .csv) files (I will be using SAS VA or Tableau to analyse offline)
* Reminder management (turn reminders off / on per client, set days before deadline etc.)

I feel the above admin-panel requirements cover off a majority of the functions I wish to undertake. However I am looking for guidance and advice on ways I could make the above things more efficient / work smarter or where I could add things I’ve not considered

System Fundamentals

* Brochure style website
* Potential clients who are looking on the website can ‘request more info’. This would ask for some brief company details (company name, contact person, contact person phone, contact person email)
* ‘Request more info’ creates a new client shell in the admin panel
* If potential client wants to purchase surveys, through the admin panel I can send a template to client contact to complete additional details required in client setup
* CMS / admin panel so I can alter content on the website pages
* An admin panel that allows me to manage surveys
* Appropriate security so my clients details are protected
* Ability to add / remove / edit persons that have access to the admin panel
* Admin panel in 4 parts (admin management, client management, survey management, response management)
* Add new clients into admin panel
* Add key details for new clients (name, address, postal address, key contact etc.)
* Add ‘branch’ details to a client where appropriate
* Each client and branch has a unique ID. So data from the client can be viewed as a whole (client + branch results) or by branch only
* Be able to add surveys to a clients profile (general and / or targeted)
* Upload bulk names and email addresses to targeted surveys (upload excel files with names / emails)
* Ability to upload documents / PDFs relating to the client (e.g. contracts / invoices etc.) these would all be generated offline, but I would like to be able to store them in the admin panel
* I imaging the admin panel will have a master general survey and list of master targeted surveys for each function. When a new client is added, in the admin panel, I would select from the master lists, the surveys the client has requested. Once added to the client, I would be able to edit the surveys copied across to personalise for the individual client. This would not change the master surveys.
* I would also require an ability to add / remove / edit surveys in the master list
* An ability to repeat previous surveys at a later date for a client. The data from the repeated surveys is captured against the client / branch in the same way as previous surveys. Data is not mixed together so I can make comparison between each set of responses
* Template driven notifications / alerts / requests sent from the admin panel
* Online survey forms recognise that questions to be asked based on the respondents level (1,2,3 or 4) and the functions being surveyed, and displays only the relevant questions – e.g. pulls from the clients list of surveys to give the right questions to be asked)
* Google analytics included in webpages
* Survey analytics if possible (how many bounced, were read, have started, were completed etc.)
* Survey frequency. For each survey a client wants completed, I can select a frequency and / or date. E.g. conduct survey every 6 months for 3 years and the system will calculate proposed dates. I can edit these suggested dates
* Notification email sent to me 1 month prior to a survey for a particular client falling due
* Reminder emails 2 days prior to a deadline. If for a general survey, a reminder with the appropriate link is sent to the initial point of contact reminding them of the deadline. The point of contact then forward to their staff. If for a targeted survey, an individual email is sent. If our system is smart enough to know who has or has not completed a survey, then only those yet to complete the survey would get a reminder

Again, this is not an exhaustive list, but is meant to be a guide on the type of things I want to achieve with this project. Other things may come / go as this project develops. I expect the developers to work **with** me on this project and suggest ideas on how we can achieve a result in a better more efficient way, or to suggest ideas that I’ve not considered.

General Survey and Target Survey Structure

I have the structure of the general and targeted surveys in an excel document currently and can forward this information to help further demonstrate the concept