Use of Survey Function

* Surveys controlled via admin panel
* Admin panel holds “master surveys”

Master surveys are held on the admin panel and can be edited / removed / added by site admin users only. These are not used by clients.

There will be:

1 x General Assessment (a high level survey)

20 x Targeted Assessments (specific surveys targeting a specific business function – e.g. audit)

All the above surveys will have the desired structure and content loaded

* When a new client is created, I can add the desired surveys to the new client. I suspect this will be from a pick list that allows me to select as few or as many surveys as are required
* These selected surveys then copy from the master list to the clients account
* I can then edit the clients version of the survey to personalise to their needs
* From the admin panel, I can look into a clients account and the surveys they have and add / remove / edit respondents.
* The admin panel generates a link unique to that client and survey
* Users following the link are taken to a page on my website to answer the various questions and then submit online.
* Responses are captured appropriately so as to not mix data with other surveys
* I will then export the data to excel where analysis and reporting will be completed offline.

Survey Details

There are 21 survey types plus the ability for me to build a survey from scratch. The survey types are:

1. General Assessment
2. Audit – Targeted Assessment
3. Business Continuity – Targeted Assessment
4. Communications – Targeted Assessment
5. Compliance – Targeted Assessment
6. Information Technology – Targeted Assessment
7. Procurement – Targeted Assessment
8. Project Management – Targeted Assessment
9. Risk Management – Targeted Assessment
10. Human Resources – Targeted Assessment
11. Business Planning – Targeted Assessment
12. Continuous Improvement – Targeted Assessment
13. Transformation / Organisational Change – Targeted Assessment
14. Privacy – Targeted Assessment
15. Cultural Diversity – Targeted Assessment
16. Customer Centricity – Targeted Assessment
17. Health & Safety – Targeted Assessment
18. Vision & Values – Targeted Assessment
19. Wastage – Targeted Assessment
20. Finance – Targeted Assessment
21. Decision Making – Targeted Assessment

GENERAL ASSESSMENT

The idea is to ask up to 10 questions for each business function (e.g. audit, business continuity, communication etc.)

So I have set a template with up to 10 questions for each function and it is roughly set out as follows The “x’ marks the category of questions that will be asked per function

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Category | Audit | Business Continuity | Communication | Compliance | Information Technology | Procurement | Project Management | Risk Management | Human Resources | Business Planning | Continuous Improvement | Transformation / Change | Privacy | Cultural Diversity | Customer Centricity | Health & Safety | Vision & Values | Wastage | Finance | Decision Making |
| Commitment | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X |  | X |
| Strategy | X | X | X | X | X | X | X | X | X |  |  |  |  |  |  |  |  |  | X |  |
| Leadership | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X |
| People | X | X | X | X | X | X | X | X | X | X | X | X | X |  |  |  |  |  | X | X |
| Processes | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X |
| Technology | X | X | X | X | X | X | X | X | X |  |  |  |  |  |  |  |  |  | X |  |
| Innovation | X | X | X | X | X | X | X | X | X |  |  |  |  |  |  |  |  |  | X |  |
| Value | X | X | X | X | X | X | X | X | X | X | X | X | X |  |  |  |  |  | X | X |
| Overall | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X |

* When I copy a general assessment to a new client, it would copy the above format across to the clients account
* I then delete the category of questions the client does not want. E.g. the client may just want to ask the category of questions “leadership” and “overall”
* The admin panel generates a link per client
* If the client has multiple branches, the admin panel generates a unique link for each branch, but is still linked to the clients overall general assessment. So I should be able to view responses as a whole (all branches collectively) or by specific branch (just analyse the data from 1 specific branch)
* Respondents need to be able to indicate what level they are in the organisation

Level 1 tier 1 and 2 management Executive Management

Level 2 tier 3 and 4 management Senior Management

Level 3 tier 5 management and below Mid Management and below

* It is important that I can identify what level a respondent is so that I can draw conclusions from their level in an organisation
* For each question, the respondent will give two answers. They will be asked to rate the “current state” and “desired future state”

TARGETED ASSESSMENT

Should the general assessment highlight a business function that needs further investigation, the client can select a targeted assessment. Eg. The client may want “risk management” to be targeted so we will conduct a targeted assessment on risk. The rough structure of targeted assessments is as below. I am just showing what the “risk management” targeted assessment could look like .. there would be 19 others (1 for each business function)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Category | Sub-Category | Level 1 | Level 2 | Level 3 | Level 4 |
| Strategy & Leadership | Programme of work | X | X | X | X |
|  | X |  | X |  |
|  |  | X |  |  |
|  | Continuous Improvement | X | X | X | X |
|  | X |  |  |  |
|  | Governance, Policy & Accountability |  | X | X | X |
|  |  | X | X |  |
|  | Strategic Planning | X |  | X | X |
| People & Development | Capability & Capacity Planning |  | X | X |  |
|  | X | X |  |  |
|  |  |  | X | X |
|  | Culture, Learning & Innovation |  | X |  |  |
| Continues … | Continues … | Continues … | Continues … | Continues … | Continues … |

* Each level of respondent would be asked a specific question relating to the sub-category and their level in the organisation.
* Respondents need to be able to indicate what level they are in the organisation

Level 1 tier 1 and 2 management Executive Management

Level 2 tier 3 and 4 management Senior Management

Level 3 tier 5 management and below Mid Management and below

Level 4 customers Customers of the business function being targeted (e.g. risk management)

* For each question, the respondent will give two answers. They will be asked to rate the “current state” and “desired future state”
* When setting up with the client, I will ask for a list of names / emails for each level. I upload that. When the survey is sent, the people in level 1 only get level 1 questions