Handbook for Custom SourceOfBusiness Survey

This feature was added in mid 2008. Its purpose is to accommodate servicers for whom the standard survey does not provide an adequate set of options.

It allows you to design the survey in its entirety (subject only to moderate constraints).

<u>The first step is to create a *SurveySourceFile*.</u>

You'll do this in Excel.

For an example file, see http://rossware.net/MiniManuals/Survey_2008.xls.

The simple idea is, this file (or spreadsheet, if you prefer to call it that) has three columns. Column A is for the questions your call-takers will be prompted to provide answers to. Column B is for the answers from which they'll be permitted to pick. Column C is for links to Next questions.

If you look at the example file, the above principles should be obvious. You'll see that I've drawn in arrows, from particular answers to particular follow-up questions. These have no effect on operation. I placed them there solely to help me mentally keep track of my own logic in structuring the flow. You may elect to do the same as you structure your file (or, if you like, you may of course start with mine and modify).

The third column simply contains the line-numbers for the questions that should follow the respective answers (they are what actually make the link that my arrows signify). You'll note that many answers do not have these "next-question" line numbers. This signifies that, for such answers, the survey is complete (i.e., no more questions).

I recommend that you refrain from filling in the third column numbers until after everything else in your layout is perfected, and lines drawn showing your logic. Then it's very simple to look at each line/answer that's got an arrow, see where the arrow leads, and type in that line number.

You'll also notice that I've left many lines with no text at all. These no-text lines have no effect on operation, but help me keep logical track of my thinking as I'm working out the scheme, and also leave potential spaces for adding new items when I think of them. One precaution in their regard: a grouping of answers (i.e., the set that pertains to a particular question) should all be together, with no empty lines between (also, the first answer must always be on *the same line* as its question).

You'll further notice that I've numerically numbered each answer set. This is not essential, but helps the operator when she's considering each set of answer options. Also, ServiceDesk is configured so, if the operator prefers, she can strike the number on her keyboard that corresponds to an answer's ordinal position (i.e., in lieu of using mouse or cursor keys to select the answer). So, if you provide such numbers, they serve as labels for the operational shortcut.

After you've perfected your spreadsheet to preference, save it under whatever name you like, but be sure to pick a location that is accessible to all ServiceDesk stations. The \sd\netdata folder on your server is, by far, the most sensible choice.

<u>The second step is to setup ServiceDesk for use of your custom survey.</u>

Just go to the *Settings* form (the quickkey combo is *Ctrl-F1*). Click on the "*Enable SourceOfBusiness Survey*" checkbox (toward the top-right corner of purple section). This now displays a new window. In it, you can indicate that your *Type of Survey* is "*Full Custom*." You must further inform ServiceDesk (in the space provided) of the file name and location that you've setup under Step 1. After this is done, save your Net-Wide values.

<u>The third step is to test.</u>

Just like the normal survey, your custom survey is invoked whenever an operator places appointment information in the appointment box of a Callsheet.

Pick a new Callsheet, put in "TEST" (or whatever you like) in the CustomerName box, then place an appointment in the appointment box. Your survey should immediately invoke, and you should try each possible path (i.e., potential sequence of questions and answers) to make sure all are working appropriately. You'll need to use a succession of Callsheets (mark each preceding one for deletion), because once you've completed a survey in one, ServiceDesk knows that it's done for that one, and won't invoke it again from that Callsheet.

ServiceDesk keeps interim results recorded in a file that has the same name and location as your source file, but with a .DAT rather than an .XLS extension. After you're done testing, it would be a good idea to delete that file so that your test answers do not mix with real operational data.

<u>The fourth step is to operate.</u>

For some reasonable test period (like perhaps a month or two), let the system work, collecting data as your operators take in calls.

Please do not make any *structural* changes to your source file during this period. ServiceDesk is compiling data based on line-numbers as exist in the file. If you change the line-positions of answers, it will essentially corrupt the data (simply because there will no longer be a proper correspondence between the particular line positions that ServiceDesk has scored and what's now in your file).

If you must make structural changes, do it with a new survey.

Changes that do not modify line positions (or ultimate meanings) are fine.

<u>The fifth step is to obtain results.</u>

To do so, go back to that same new window (as described in Step 1) in the Settings form. There's a button in it labeled "*export Results*."* Click on it and follow the prompts.

Essentially, you'll be asking ServiceDesk to create a new Excel spreadsheet. This spreadsheet will be identical to your survey source file, except its third column will be replaced with numerical results. Essentially, next to each answer will be a number-tally indicating how many times that answer was clicked.

If you want, there's no reason you can't create (and/or re-create) this "results" file as often as you like, while your survey is in-progress.

<u>After you've obtained results, what's next?</u>

As one option, if you've surveyed long enough to have statistically viable results (i.e., your sample size is sufficient to assure you're getting a reasonably accurate look at what's going on), you might turn off surveying, pending a new period in the future (it's done, of course, from the Settings form).

Then maybe a bit of time passes, and you want to survey again (or perhaps you want to begin immediately, with a modified survey, absent any gap).

No problem.

To initiate a new survey, create a new source file. It will likely be easiest to begin with your prior one as a starting point. Just open it in Excel, make any changes you want, then save under a new name (whatever you like).

Now, back in the ServiceDesk Settings form, designate that new file, make sure "Full Custom" is toggled on, test, and (hurrah) you're off on a new survey.

* I admit the Settings form is a strange place to stick an operation such as exporting survey results, but there's minimal logic in that it's in the same little box where we're doing Settings-form-sensible stuff relating to the CustomSurvey, and for the time-being at least that seems to make it the most logical place.