Questionnaire Management Guidelines

Goals:

- One consolidated document to track all model and CQ changes throughout the life of the project
- Questionnaire always matches the live survey
- Easy and error-free way to submit CQ changes
- All changes tracked and reflected in one document (DOT will help)

Questionnaire Resources:

- 1 <u>Questionnaire Design and Approval Process</u>
- 2 <u>Question Grouping Rules</u>
- 3 OPS vs. Skip Logic Decision for "Other, Please Specify"
- 4 Foreign Language Survey Instructions

Client Name: Measure Name:	EFTPS
Custom Qualifier Page	Please Select
Custom Invitation Text?	Please Select
Custom Tracker Text?	Please Select
Custom Welcome/ Thank You Text?	Please Select

Language(s)	If other language not listed, please specify.	Website URL	MID(s) (DOT FILL THIS IN)	Measure Name(s) (DOT WIII FILL THIS IN)
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Model Instance Name: EFTPS





Welcome and Thank You Text

Directions:

Date: 5/30/2012

This welcome text is shown at the top of the questionnaire window and the thank you text at the bottom. This is a good place to mention the site/company/agency name so the visitor knows whom they are taking the survey for. Feel free to modify the standard Welcome text shown in the box below.

Welcome Text

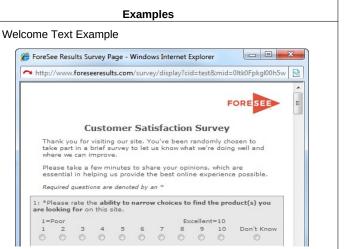
Thank you for visiting our site. You've been randomly chosen to take part in a brief survey to let us know what we're doing well and where we can improve.

Please take a few minutes to share your opinions, which are essential in helping us provide the best online experience possible.

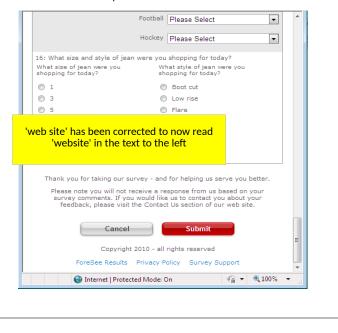
Thank You Text

Thank you for taking our survey - and for helping us serve you better.

Please note you will not receive a response from us based on your survey comments. If you would like us to contact you about your feedback, please visit the Contact Us section of our website. If you would like to share further feedback, please leave a message at 202.874.3530 or e-mail sbse.eftps@irs.gov.



Thank You Text Example



Model Instance Name: EFTPS

Existing Measure - Please fill in; New Measure - DOT will fill in



Partitioned Y

MID:

NOTE: All non-partitioned surveys will NOT be imputed and the elements will be rotated as a default unless otherwise specified and approved by Research.

Date:

	5/30/2012				
			EFTPS		
	Model questions u	tilize the ACSI m	ethodology to determine scores and impacts		
MQ Label	ELEMENTS (drivers of satisfaction)	MQ Label	CUSTOMER SATISFACTION	MQ Label	FUTURE BEHAVIORS
	Navigation (1=Poor, 10=Excellent, Don't Know)		Satisfaction		Likelihood to Contact Call Center (1=Very Unlikely, 10=Very Likely)
Navigation - Organized	Please rate how well the site is organized.	Satisfaction - Overall	What is your overall satisfaction with this site? (1=Very Dissatisfied, 10=Very Satisfied)	Contact Call Center	How likely are you to call customer service support as a result of your visit today?
Navigation - Options	Please rate the options available for navigating this site.	Satisfaction -	How well does this site meet your expectations?		Return (1=Very Unlikely, 10=Very Likely)
Navigation - Layout	Please rate how well the site layout helps you find what you are looking for.	Satisfaction - Ideal	How does this site compare to your idea of an ideal website?	Return	How likely are you to return to this site.
	Site Performance (1=Poor, 10=Excellent, Don't Know)				Use Site Via Mobile Device (1=Very Unlikely, 10=Very Likely)
Site Performance - Loading	Please rate how quickly pages load on this site.			Use Site Via Mobile Device	How likely are you to access this site using a mobile device?
Site Performance - Consistency	Please rate the consistency of speed from page to page on this site.				Primary Resource (1=Very Unlikely, 10=Very Likely)
Site Performance - Errors	Please rate the ability to load pages without getting error messages on this site.			Primary Resource	How likely are you to use this site as your primary resource for paying your taxes?
	Plain Language (1=Poor, 10=Excellent, Don't Know)				
Plain Language - Clear	Please rate the clarity of the wording on this site.				
Plain Language - Understandable	Please rate how well you understand the wording on this site.				
Plain Language - Concise	Please rate this site on its use of short, clear sentences.				
	Look and Feel (1=Poor, 10=Excellent, Don't Know)				1
Look and Feel - Appeal	Please rate the visual appeal of this site.				
Look and Feel - Balance	Please rate the balance of graphics and text on this site.				
Look and Feel - Readability	Please rate the readability of the pages on this site.				
	Tasks/ Transactions (1=Poor, 10=Excellent, Don't Know)				
Tasks/ Transactions - Simplicity	Please rate the simplicity of the process for completing task(s) on this site.				
Transactions - Instructions	Please rate the clarity of instructions for completing task(s) on this site.				
Tasks/ Transactions - Verification	Please rate the verification of task completion on this site.				

red & strike-through: DELETE

underlined & italicized: RE-ORDER

pink: ADDITION

blue + -->: REWORDING

		EFTPS CUSTOM QUESTIO	N LIST					
Skip Logic Label	Question Text	Answer Choices (limited to 50 characters)	Skip to	Type (select from list)	Single or Multi	Required Y/N	Special Instructions	CQ Label
	How frequently do you visit this site?	This is my first visit		Radio button, one-up vertical	Single	Y		Visit Frequency
		Monthly			_			
		Weekly						
		Annually	_					
		Quarterly						
	What best describes your role in visiting the EFTPS site today?	Owner or employee of a business with 2-10 employees		Radio button, one-up vertical	Single	Y		Role
		Owner or employee of a business with 11-25 employees						
		Owner or employee of a business with 26 or more employees						
		Third party (tax professional, attorney, financial institution or other agent) making payments for 1-5 clients						
		Third party (tax professional, attorney, financial institution or other agent) making payments for 5-25 clients						
		Third party (tax professional, attorney, financial institution or other agent) making payments for 26 or more clients						
		Sole proprietor						
		Individual						

5/30/2012

		Question Setup	red & strike-through : DELETE <u>underlined & italicized</u> : RE-ORDER pink: ADDITION blue +>: REWORDING						
			CUSTOM QUESTION LIST						
QID (Group ID)	Skip Logic Label	Question Text	Answer Choices (limited to 50 characters)	Skip to	Type (select from list)	Single or Multi	Required Y/N Y		
Generic "spend" intention for benchmarking and to compare to 2008, 2009 and 2010	r ing Do you expect to spend more or less online during the 2010 holiday season compared to 2009? Please use the following guidelines: - DO NOT MODIFY THE WORDING of the ANSWER CHOICES								
Spend intention with this retailer		Do you expect to spend more or less online during the 2010 holiday season with <i>retailer.com</i> compared to 2009?	A little more I expect to spend about the same amount as last year A little less A lot less Not sure	R S S			Y		
	R	Why do you expect to spend more online with <i>retailer.com</i> this holiday season? (please select all that apply)	Promotions (\$ or % off offers) Quality of merchandise Merchandise selection Good return policy Online product prices Shipping costs Availability of merchandise Better personal economic circumstances this year	-	Checkbox, one-up vertical	Multi	Y		



Special Instructions
Skip Logic Group
Skip Logic Group

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				CUSTOM QUES	TION LIST						
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Logic	c	Question Text		Answer Choices (limited to 50 characters)	Skip to	Type (select from list)	Single or Multi	Required Y/N	Special Instructions	CQ Label	Application Note
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				A little more	_						questions
				I expect to spend about the same amount as last year A little less	_						
				A lot less Not sure	_						
	D h	Do you expect to spend more or less onlin holiday season with retailer.com compared	ne during the 2011 d to 2010?	I didn't purchase anything from retailer.com last year		Drop down, select one	Single	Y	Skip Logic Group	H2011-Spend retailer	Added in 2009, relates d the retailer and should be the holiday batter
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				A little less A lot less	B						
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				Merchandise selection Good return policy							
				Online product prices Shipping costs							
				Availability of merchandise Better personal economic circumstances this year							
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				Poor merchandise selection Return policy							
				I'm trying to save more and spend less Online product prices							
				Shipping costs Poor availability of merchandise							
				Worse personal economic circumstances this year Other (please specify):	сс	-			Anchor Answer Choice		
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				I bought a gift for someone else today	_				Pantomita		not replace what you ha lose trending.
				I was browsing today to purchase online later I was browsing today to purchase at one of the store locations					Randomize		not replace what you hav lose trending.
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		Which of the following phrases would you use to describe your experience with this website? (Select all that apply)	Provides enjoyment Makes me happier Inspires my life			Checkbox, one-up vertical	Multi	No	Randomize	CME - Phrase
			Challenges my thinking							
			Part of my routine							
			Visited daily	Please use the fo	llowing g	uidelines:				
			Helps me make better decisions			ORDING of the ANSW				
			Improves my life			HOICES OR DELETE A	NSWER CH	OICES		
			Makes me a better person	- DO NOT change	e the CQ	LABELS				
			Makes me closer to my community							
			Provides viewpoints from others							
			Gives opportunity to comment					1		_
			Lets me interact with others							
			Provides a social outlet for me							
			Keeps me informed							
			Enables discussions with others							
			Other, please specify		А				Anchor Answer Choice	
	A	Please provide any other phrases you would use to describe your experience with this website.				Text area, no char limit		No	Skip Logic Group	OE_CME Phrase
deneen.davis: DO NOT USE. FROM PHASE	THESE QUE	In the following section, please consider the personal meaning of with this brand's website. STIONS WERE please describe the MEANING of this				Text area, no char limit	Single	N		CME - Meaning
		In the space below, please describe HOW YOU USE the information you get, or the experience you have, with this website.				Text area, no char limit	Single	N		CME - Use
		In the space below, please describe the most MEMORABLE MOMENT you have had with this website.				Text area, no char limit	Single	N		CME - Memorable

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Questions Below Are Optional, They Are Not Used In The Social Media Value Calculation.

	If you heard about this website from a social network, please specify the site (i.e. Facebook, Twitter)				N		SV - Other Social Network
				Text area, no char limit			
	If you heard about this website from a social network, please select which social network it was.	delicious		Radio button, one-up vertical	N	OPS Group	SV-Social Network
		digg					
		Facebook					
		Facebook Google+	1				
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		LinkedIn	1				
		LivingSocial	1				
		MySpace	1				
		reddit	1				
		StumbleUpon	1				
		Twitter					
		YouTube					
		Other, please specify	A			Anchor Answer Choice	
A	If you heard about this website from a social network, please specify the site.			Text field, <100 char	N	OPS Group	SV - Other Social Network

	tance Name: sure Name 11/1/2011			red & strike through: DELETE underlined & italicized: RE-ORDER pink: ADDITION blue +>: REWORDING				FORESEE	
				Fill-in Measure Name CUSTOM QUESTIO	DN LIST				
QID	Skip Logic Label	Question Text How likely are you to discourage others fro business with this company?	- DO NOT - DO NOT Contact G	Name		Single or Multi Single	Required Y/N Y	Special Instructions	CQ Label WordofMouthindex

PUBLIC SECTOR OPTIONS

How likely are you to discourage others from doing business with this agency/association/organization?	1 = Very Unlikely	Radio button, scale, no don't know	Single	Y		WordofMouthIndex
business with this agency/association/organization?			-			
	2					
	10 = Very Likely					
 How likely are you to discourage others from		Radio button, scale, no don't know	Single	Y		WordofMouthIndex
How likely are you to discourage others from interacting with this association/agency/organization?	I - Very Officery	Radio bullon, scale, no dont know	Siriyie			wordonwodthindex
5						
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