

## Survey Invitation

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This is the standard survey invitation. Default text is included. If you would like to modify this text please check with your analyst/client manager.

## Welcome and Thank You Text

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The text you see here will appear at the top and bottom of your survey. Default text is included and you may modify this text as needed.

## Model Questions

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As discussed during the kick-off call, the model questions are part of the ForeSee methodology. For consistency with the model, these questions are standardized and have been tested and validated. Standardization of model questions allows benchmarking across companies/industries, and these questions are used in calculating scores and impacts.

Focus on the future behaviors; I've started with some that I believe are a good fit but we can certainly make adjustments. These are desired customer outcomes that are impacted by customer satisfaction.

## Custom Questions

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When reviewing the custom questions tab, keep in mind these questions are used for segmentation analysis of the model data. It is suggested that you add, delete or change custom questions over time, as your needs or business objectives change.

### Focus Area #1: Achieving Actionable Data

- Know what changes are being made based on the intelligence
- Change Custom Questions so that stakeholders see a clear "must do"

### Focus Area #2: Aligning Data to Business Strategies

- Update your Custom Questions as business cycles change
- Integrate Executive Level questions to evaluate initiatives

### Focus Area #3: Strategic and Tactical Value

- Influence Board Room Decisions
- Change Operational Approaches
- Mature Your Research

### Why

- Analysis
- Top-Pri
- Open-e
- Shift w
- Inform
- Evalua

## Making Changes

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Simply make the change that you desire and highlight that change with a different color text. **Red** works well because it stands out.

If the change is "complicated" a brief explanation about what you would like to accomplish will help us understand your request and figure out the best way to implement. -Or- Just give us a call; talking through changes over the phone makes it quick and easy.

### **Update Your Custom Questions?**

Uncovered new questions to ask  
Key areas influence resource use  
Seek for quantifiable recommendations

Seasonal Needs

Re-launch or Re-design

Marketing Initiatives



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### Survey Invitation Text Desktop

**We'd welcome your feedback!**

Thank you for visiting myRA.gov. You have been selected to participate in a brief customer satisfaction survey to let us know how we can improve your experience.

**The survey is designed to measure your entire experience, please look for it at the conclusion of your visit.**

This survey is conducted by an independent company ForeSee, on behalf of the site you are visiting.

(Button text)    No, thanks                      Yes, I'll give feedback

### Example Desktop

**abc company**                      FORESEE

**We'd welcome your feedback!**

Thank you for visiting our website. You have been selected to participate in a brief customer satisfaction survey to let us know how we can improve your experience.

**The survey is designed to measure your entire experience, please look for it at the conclusion of your visit.**

This survey is conducted by an independent company ForeSee, on behalf of the site you are visiting.



**No, thanks**                      **Yes, I'll give feedback**

TRUSTe Certified Privacy

*⌘ please check with your analyst/client manager.*



The text you see here will appear at the top and bottom of your survey, examples below.  
Default text is included and you may modify this text as needed.

| Welcome and Thank You Text   |
|--|
| <p style="text-align: center;"><b>Welcome Text</b></p> <p>Thank you for visiting myRA.gov. 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.</p> <p>Please take a few minutes to share your opinions, which are essential in helping us provide the best online experience possible.</p>   |
| <p style="text-align: center;"><b>Thank You Text</b></p> <p>Thank you for taking our survey - and for helping us serve you better.</p> <p>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.</p>  |
| <p style="text-align: center;"><b>Example Desktop</b></p> <div style="border: 1px solid black; padding: 10px;"><p style="text-align: center;"></p><p style="text-align: center;"><b>Customer Satisfaction Survey</b></p><p>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.</p><p>Please take a few minutes to share your opinions, which are essential in helping us provide the best online experience possible.</p><p><i>Required questions are denoted by an *</i></p><p style="text-align: center;"></p><p><i>Note: *Please note the extent to which the products on this website apply to</i></p><p style="text-align: center;"><i>disag.ee</i></p><p>Thank you for taking our survey - and for helping us serve you better.</p><p>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 web site.</p><p style="text-align: center;"><input type="button" value="Cancel"/> <input type="button" value="Submit"/></p><p style="text-align: center;">Copyright 2016 - all rights reserved</p><p style="text-align: center;"><a href="#">ForeSee</a> <a href="#">ForeSee Privacy Policy</a> <a href="#">Contact Us</a></p></div> |

Model Name myRA Desktop Browse  
 Model ID  
 Partitioned Yes - 2MQ  
 Date 2/1/2017

~~Red & Strike-Through~~: Delete  
Underlined & Italicized: Re-order  
 Pink: Addition  
 Blue: Reword



| Label                                | Element Questions   | Label                          | Satisfaction Questions  | Label                | Future Behaviors  |
|--------------------------------------|---|--------------------------------|---|----------------------|---|
|                                      | <b>Look and Feel (1=Poor, 10=Excellent, Don't Know)</b>   |                                | <b>Satisfaction</b>   |                      |   |
| 1 Look and Feel - Appeal             | Please rate the visual appeal of this site.   | 16 Satisfaction - Overall      | What is your overall satisfaction with this site?<br>(1=Very Dissatisfied, 10=Very Satisfied)     | 19 Return            | Return (1=Very Unlikely, 10=Very Likely)<br>How likely are you to return to myRA.gov in the future? |
| 2 Look and Feel - Balance            | Please rate the balance of graphics and text on this site.  | 17 Satisfaction - Expectations | How well does this site meet your expectations?<br>(1=Falls Short, 10=Exceeds)                    |                      | Recommend Company (1=Very Unlikely, 10=Very Likely)   |
| 3 Look and Feel - Readability        | Please rate the readability of the pages on this site.  | 18 Satisfaction - Ideal        | How does this site compare to your idea of an ideal website?<br>(1=Not Very Close, 10=Very Close) | 20 Recommend Company | How likely are you to recommend myRA.gov to someone else?   |
|                                      | <b>Site Performance (1=Poor, 10=Excellent, Don't Know)</b>  |                                |   |                      | Primary Resource (1=Very Unlikely, 10=Very Likely)  |
| 4 Site Performance - Loading         | Please rate how quickly pages load on this site.  |                                |   | 21 Primary Resource  | How likely are you to use this site as your primary resource for obtaining information about myRA?  |
| 5 Site Performance - Consistency     | Please rate the consistency of speed from page to page on this site.                                |                                |   |                      | Apply Online (1=Very Unlikely, 10=Very Likely)  |
| 6 Site Performance - Completeness    | Please rate how completely the page content loads on this site.                                     |                                |   | 22 Apply Online      | How likely are you to submit an application online with myRA.gov in the next 30 days?               |
|                                      | <b>Navigation (1=Poor, 10=Excellent, Don't Know)</b>  |                                |   |                      |   |
| 7 Navigation - Organized             | Please rate how well this site is organized.  |                                |   |                      |   |
| 8 Navigation - Options               | Please rate the options available for navigating this site.   |                                |   |                      |   |
| 9 Navigation - Layout                | Please rate how well the site layout helps you find what you need.                                  |                                |   |                      |   |
|                                      | <b>Information Browsing (1=Poor, 10=Excellent, Don't Know)</b>                                      |                                |   |                      |   |
| 10 Information Browsing - Sort       | Please rate the ability to sort information by criteria that are important to you on this site.     |                                |   |                      |   |
| 11 Information Browsing - Narrow     | Please rate the ability to narrow choices to find the information you are looking for on this site. |                                |   |                      |   |
| 12 Information Browsing - Features   | Please rate how well the features on the site help you find the information you need.               |                                |   |                      |   |
|                                      | <b>Site Information (1=Poor, 10=Excellent, Don't Know)</b>  |                                |   |                      |   |
| 13 Site Information - Thoroughness   | Please rate the thoroughness of information provided on this site.                                  |                                |   |                      |   |
| 14 Site Information - Understandable | Please rate how understandable this site's information is.  |                                |   |                      |   |
| 15 Site Information - Answers        | Please rate how well the site's information provides answers to your questions.                     |                                |   |                      |   |

Model Name myRA Desktop Browse  
 Model ID 0  
 Partitioned Yes - 2MQ  
 Date 2/1/2017

~~Red & Strike-Through~~: Delete  
Underlined & Italicized: Re-order  
 Pink: Addition  
 Blue: Reword



| QID | Skip From | Question Text  | Answer Choices  | Skip To | Required Y/N | Type                          | Special Instructions   | CQ Label                   |
|-----|-----------|--|---|---------|--------------|-------------------------------|--|----------------------------|
|     |           | What is your primary reason for visiting the site today?<br><br>Moved this question up and revised first answer option per your request.   | Learn about myRA<br><br>Enroll with myRA<br>Log in to my account to check status<br>Contribute funds to a myRA account<br>Manage my personal profile<br>Get answers from the FAQ section<br>Download forms<br>Download presentations, flyers or other resource materials<br>Download toolkits<br>Watch informative videos<br>Use myRA savings calculators<br>Find contact information<br>Other (please specify) |         | Y            | Radio button, one-up vertical | Skip Logic Group*<br><br>Randomize<br><br>Anchor Answer Choice                       | Primary Reason             |
|     | A         | Please specify the other reason for your visit.  |   |         | N            | Text field, <100 char         | Skip Logic Group*  | Primary Reason - Other     |
|     |           | Did you accomplish what you wanted to do today on this site?   | Yes<br><br>No   |         | Y            | Radio button, one-up vertical | Skip Logic Group*  | Accomplish                 |
|     | A         | Please tell us why you were unable to accomplish your task today.  |   |         | N            | Text area, no char limit      | Skip Logic Group*  | Why Not Accomplish         |
|     |           | What source brought you to the site today?<br><br>Moved first question to here and reworded.<br>Also added "Tax Preparation Software" answer option<br><br>Also revised followup question below per request to match change in initial question wording. | Recommendation from someone I know<br><br>Search engine<br>I have been to this site before<br>Tax preparation software<br>A news article or press release<br>Another government agency<br>Internet blogs or discussion forums<br>Information on social networks (Facebook, Twitter)<br>Other (please specify)   |         | Y            | Radio button, one-up vertical | Skip Logic Group*<br><br>Randomize<br><br>Anchor Answer Choice                       | Acquisition Source         |
|     | A         | Please specify the source that led you to the site today.  |   |         | N            | Text field, <100 char         | Skip Logic Group*  | Acquisition Source - Other |
|     |           | How did you look for information or navigate the site today? (Please select all that apply.)   | Top navigation bar<br><br>Search feature<br>Clicked on links on the page<br>Page bookmark or favorite link<br>Google or other search engine<br>Other (please specify)   |         | Y            | Checkbox, one-up vertical     | Skip Logic Group*  | Navigation Method          |
|     | A         | Please tell us how else you looked for information.  |   |         | N            | Text area, no char limit      | Skip Logic Group*  | Navigation Method - Other  |
|     | B         | Please tell us about your experience with the site's search feature today. (Select all that apply.)  | Results were not relevant/not what I wanted<br><br>Too many results/I needed to refine my search<br>Not enough results<br>Returned NO results<br>Received error message(s)<br>Search speed was too slow<br>I experienced a different search issue:<br>I had no difficulty with search / results were helpful  |         | Y            | Checkbox, one-up vertical     | Randomize<br><br>Skip Logic Group*<br><br>Anchor Answer Choice<br>Mutually Exclusive | Search Experience          |
|     | C         | Please specify the search issue you experienced.   |   |         | N            | Text area, no char limit      | Skip Logic Group*  | Search Issue - Other       |
|     |           | How would you describe your browsing experience on the site today? (Please select all that apply.)   | Links often did not take me where I expected<br><br>I had difficulty finding relevant information<br>Links and labels were difficult to understand<br>There were too many links or navigation options to choose from<br>I had technical difficulties (error messages, broken links, etc.)<br>I could not navigate back to previous information<br>I had a different navigation difficulty                       |         | Y            | Checkbox, one-up vertical     | Skip Logic Group*<br><br>Randomize<br><br>Anchor Answer Choice                       | Navigation Experience      |

|  |   |  |   |   |   |                               |   |                               |
|--|---|--|---|---|---|-------------------------------|---|-------------------------------|
|  | A | Please specify your navigation difficulty.   | I had no difficulty navigating the site             |   | N | Text area, no char limit      | Mutually Exclusive<br>Skip Logic Group* | Navigation Experience - Other |
|  |   | Did using myRA.gov save you from having to call us or e-mail us?<br>ADDED NEW QUESTION HERE PER REQUEST                | Yes   | A | Y | Radio button, one-up vertical |   | Saved Further Contact         |
|  |   | Which of the following issues, if any, did you experience while reviewing information? (Please select all that apply.) | No, I had to call or email after using the site     |   | Y | Checkbox, one-up vertical     | Skip Logic Group*                       | Information Issues            |
|  |   |  | Information was not up to date                      |   |   |                               |   |                               |
|  |   |  | Information did not answer my questions             |   |   |                               |   |                               |
|  |   |  | Information was not presented in a concise format   |   |   |                               |   |                               |
|  |   |  | Wording was not clear                               |   |   |                               |   |                               |
|  |   | Text was difficult to read   |   |   |   |                               |   |                               |
|  |   | Other (please specify)   |   | A |   |                               |   |                               |
|  |   | No issues reviewing information occurred   |   |   |   |                               | Mutually Exclusive<br>Skip Logic Group* |                               |
|  | A | Please specify the other issue you experienced reviewing information.  |   |   | N | Text area, no char limit      | Skip Logic Group*                       | Other Information Issues      |
|  |   | Which of these best describes you?<br>first answer option changed from Citizen to Individual per request.              | Individual  |   | Y | Drop down, select one         |   | Role                          |
|  |   |  | Employer  |   |   |                               |   |                               |
|  |   |  | Tax Professional                                    |   |   |                               |   |                               |
|  |   |  | Community Partner                                   |   |   |                               |   |                               |
|  |   |  | Consumer Organization                               |   |   |                               |   |                               |
|  |   |  | Business Association                                |   |   |                               |   |                               |
|  |   |  | Media   |   |   |                               |   |                               |
|  |   |  | Other   |   |   |                               |   |                               |
|  |   | How often do you visit this site?  | This is my first visit                              |   | Y | Drop down, select one         |   | Visit Frequency               |
|  |   |  | Once every 6 months or less often                   |   |   |                               |   |                               |
|  |   |  | Once every few months                               |   |   |                               |   |                               |
|  |   |  | Monthly   |   |   |                               |   |                               |
|  |   |  | Weekly  |   |   |                               |   |                               |
|  |   |  | Daily or more often                                 |   |   |                               |   |                               |
|  |   | Do you have an existing myRA account?<br>Removed Log in question   | Yes   |   | Y | Radio button, one-up vertical |   | Existing account              |
|  |   |  | No  |   |   |                               |   |                               |
|  |   | What else would you like to share with us to help improve your online experience with myRA.gov?                        |   |   | N | Text area, no char limit      |   | Improve                       |
|  |   | What is your gender?   | Male  |   | N | Radio button, one-up vertical |   | Demos: Gender Fed Govt        |
|  |   |  | Female  |   |   |                               |   |                               |
|  |   |  | Prefer not to respond                               |   |   |                               |   |                               |
|  |   | Which category includes your household income?   | Under \$25,000                                      |   | N | Drop down, select one         |   | Demos: Income                 |
|  |   |  | \$25,000 - \$49,999                                 |   |   |                               |   |                               |
|  |   |  | \$50,000 - \$74,999                                 |   |   |                               |   |                               |
|  |   |  | \$75,000 - \$99,999                                 |   |   |                               |   |                               |
|  |   |  | \$100,000 or more                                   |   |   |                               |   |                               |
|  |   |  | Prefer not to respond                               |   |   |                               |   |                               |
|  |   | Which category includes your age?  | Under 18  |   | N | Drop down, select one         |   | Demos: Age                    |
|  |   |  | 18 - 24   |   |   |                               |   |                               |
|  |   |  | 25 - 34   |   |   |                               |   |                               |
|  |   |  | 35 - 44   |   |   |                               |   |                               |
|  |   |  | 45 - 54   |   |   |                               |   |                               |
|  |   |  | 55 - 64   |   |   |                               |   |                               |
|  |   |  | 65 or older   |   |   |                               |   |                               |
|  |   |  | Prefer not to respond                               |   |   |                               |   |                               |
|  |   | What is your highest level of education completed?   | Some high school or less                            |   | N | Drop down, select one         |   | Demos: Education              |
|  |   |  | High school graduate or GED                         |   |   |                               |   |                               |
|  |   |  | Some college credit, no degree                      |   |   |                               |   |                               |
|  |   |  | Associate degree (e.g., AA, AS)                     |   |   |                               |   |                               |
|  |   |  | Bachelor's degree (e.g., BA, AB, BS)                |   |   |                               |   |                               |
|  |   |  | Master's degree (e.g., MA, MS, MEng, MEd, MSW, MBA) |   |   |                               |   |                               |
|  |   |  | Professional degree (e.g., MD, DDS, DVM, LLB, JD)   |   |   |                               |   |                               |
|  |   |  | Doctorate degree (e.g., PhD, EdD)                   |   |   |                               |   |                               |
|  |   |  | Prefer not to respond                               |   |   |                               |   |                               |
|  |   | What is your ethnicity?  | Hispanic or Latino                                  |   | N | Radio button, one-up vertical |   | Demos: Ethnicity Fed Govt     |
|  |   |  | Not Hispanic or Latino                              |   |   |                               |   |                               |
|  |   |  | Prefer not to answer                                |   |   |                               |   |                               |



|  |  |   |  |   |                           |                    |                      |
|--|--|---|--|---|---------------------------|--------------------|----------------------|
|  | What is your race? (Please select all that apply.) | American Indian or Alaska Native<br>Asian<br>Black or African American<br>Native Hawaiian or Other Pacific Islander<br>White<br>Prefer not to respond |  | N | Checkbox, one-up vertical | Mutually Exclusive | Demos: Race Fed Govt |
|--|--|---|--|---|---------------------------|--------------------|----------------------|