

Satisfaction Survey for a Finance Team

Initially, once a year and then twice a year, run a statistically based sample survey on your in-house customers. Send them the survey set out in this appendix. The key features are:

- Ask two open-ended questions that will generate most of the benefit for the survey: “What are the three things we do well?” and “What are the three things we can improve on?” Never ask about the problems, as half of them will not be fixable.
- Categorize all responses to these questions in a database and sort out by positive comments and suggestions for improvement.
- Use a five-point scale.
- Separate out accounting system dramas from the services your team provides by asking a series of system-related questions.
- Send them by email or use a web-based survey package as sourced from www.SurveyMonkey.com.
- Never ask questions you will not act on.
- Make the questionnaire simple and able to be completed in 10 minutes.

FINANCE TEAM USER SATISFACTION QUESTIONNAIRE

The purpose of the user satisfaction survey is to aid the finance team to deliver a quality service. In this questionnaire we are seeking to investigate your satisfaction with your relationship with the **finance team since _____**. Your response will help us make sure we deliver a quality service.

Your response (in the shaded areas) will help us make sure we deliver a quality service. The comment fields are a very helpful part of a feedback to the finance team. Please invest time in making the comments as specific as possible and give examples where this is appropriate. Your ratings and your comments are totally confidential. _____ (the company conducting the survey) will prepare the statistical data and display comments so as to conceal the identities of respondents. Please return no later than _____ by e-mail to _____@_____.

How satisfied are you with the finance team's systems in the following areas? Please use the rating scale for the survey.

Rating 5 = Very satisfied, 4 = Satisfied, 3 = Neither satisfied nor dissatisfied, 2 = Dissatisfied, 1 = Very dissatisfied, X = cannot rate						
Finance System	Cannot Rate	Ease of Use	Ease of Accessing Data You Need	Adequacy of Reporting	Usefulness of System's Reference Guide	Adequacy of Help Desk Support
Purchase order system						
Accounts payable system						
Expense claim system						
Purchasing card system						
Accounts receivable system						
General ledger/ Reporting system						
Payroll system						
Forecasting system						

***How satisfied are you with the following finance team's activities?
Please use the rating scale for the survey.***

Rating 5 = Very satisfied, 4 = Satisfied, 3 = Neither satisfied nor dissatisfied, 2 = Dissatisfied, 1 = Very dissatisfied, X = Not applicable, cannot rate						
How satisfied are you with the:	Cannot Rate	Timeliness	Accuracy (Quality Assurance)	Proactive/ Responsiveness	Expertise of Staff	Output (Fit for Purpose)
Processing of sales invoices?						
Processing of purchase invoices?						
Fixed assets processing/ reporting?						
Payment of expenses?						
Coordination and support of budget process?						
Coordination of reforecasting?						
Advice to business units? (on variance analysis, planning, financial implications of policy, etc.)						
Monthly financial information?						
One-to-one training?						
_____ (please specify)						
_____ (please specify)						

Please rate your satisfaction with the finance team's working style (only those teams you have contact with).

Rating 5 = Very satisfied, 4 = Satisfied, 3 = Neither satisfied nor dissatisfied, 2 = Dissatisfied, 1 = Very dissatisfied, x = Not applicable, cannot rate					
How satisfied are you with the:	Accounts Payable	Accounts Receivable	Management Accounting	Payroll	Systems Accountants
Team's accessibility and promptness in replying to your queries?					
Willingness to take ownership of issues (including responding constructively to criticism)?					
Proactive role of the team in anticipating issues?					
Team's understanding of issues from your perspective?					
Team's service ethic (approachability, positive attitude, supportiveness, commitment to continuous improvement)?					
Degree of respect the team demonstrates toward you (e.g., arriving on time for meetings, delivering to deadlines, honoring promises, responding to e-mails)?					
Team's follow through/ability to close issues?					

Please rate your satisfaction with the finance team's communication (only those teams you have contact with).

Rating 5 = Very satisfied, 4 = Satisfied, 3 = Neither satisfied nor dissatisfied, 2 = Dissatisfied, 1 = Very dissatisfied, x = Not applicable, cannot rate					
How satisfied are you with the:	Accounts Payable	Accounts Receivable	Management Accounting	Payroll	Systems Accountants
Frequency of face-to-face communication (e.g., not hiding behind emails)?					
Way we communicate operational/routine issues?					
Way we communicate complex issues?					
Overall effectiveness of our communication?					
Meetings that we host (keeping the meeting on track and on time)?					
Contribution we make to meetings you host (being prepared, our level of participation, and the follow-up action we undertake)?					
Presentations we deliver?					
Content of the finance team's intranet pages?					
Reporting we give you?					

What do you consider to be the three main strengths of this service? (If you have used any “5” ratings, please give examples).

What do you consider are three main areas for this service to develop? (If you have used any “1” ratings, please give examples. Please also give suggestions of specific changes you would like.)

Please insert your name. Your name will only be used for administrative purposes.	
If the findings of this survey were to be presented, would you be interested in attending the presentation?	Yes / No (Circle as appropriate)

Thank you for participating.