DEPARTMENT OF VETERANS AFFAIRS

VETERANS HEALTH ADMINISTRATION

OFFICE OF HEALTH INFORMATION

PRODUCT EFFECTIVENESS

CUSTOMER SATISFACTION PROGRAM

PROCESS & PROCEDURES v12

Table of Contents

1. Introduction

The purpose of this document is to describe the procedures for undertaking a Customer Satisfaction (CS) engagement within the Department of Veterans Affairs' Veterans Health Administration (VHA) .

The CS program is a component of the Product Effectiveness (PE) group, which is organized under the VHA Office of Health Information (OHI) office. PE's mission is to facilitate activities and perform independent assessments on IT products developed or purchased for VHA to ensure they are effective and meet the needs of the customer in terms of function, business case realization, and user satisfaction. The PE operations have been organized into four (4) separate but inter-related domains: Functional Reviews, Customer Satisfaction, Business Case Reviews/Benefits Realization, and Lessons Learned. This document provides the high-level process as well as the steps required for proper execution of a customer satisfaction engagement for the CS domain within PE.

The CS Process & Procedures document will evolve and be updated after each CS pilot engagement as the PE team applies lessons learned to the original process. The main body of the Process & Procedures document is comprised of three (3) primary sections as follows:

1. Introduction – provides the purpose and overview of the Process & Procedures document
2. CS Process Flow – provides a high-level CS survey process flow, as approved by the Chief Officer of VHA's Office of Health Information in December, 2007.
3. CS Engagement Process & Procedures – provides the step-by-step detail performed throughout the course of a CS engagement. The detailed work steps will cover the following four (4) phases of a CS engagement:

   1.0 Due Diligence in preparation for a PE CS engagement

   2.0 Engagement Planning in preparation for a PE CS engagement

   3.0 Engagement Execution for a PE CS engagement

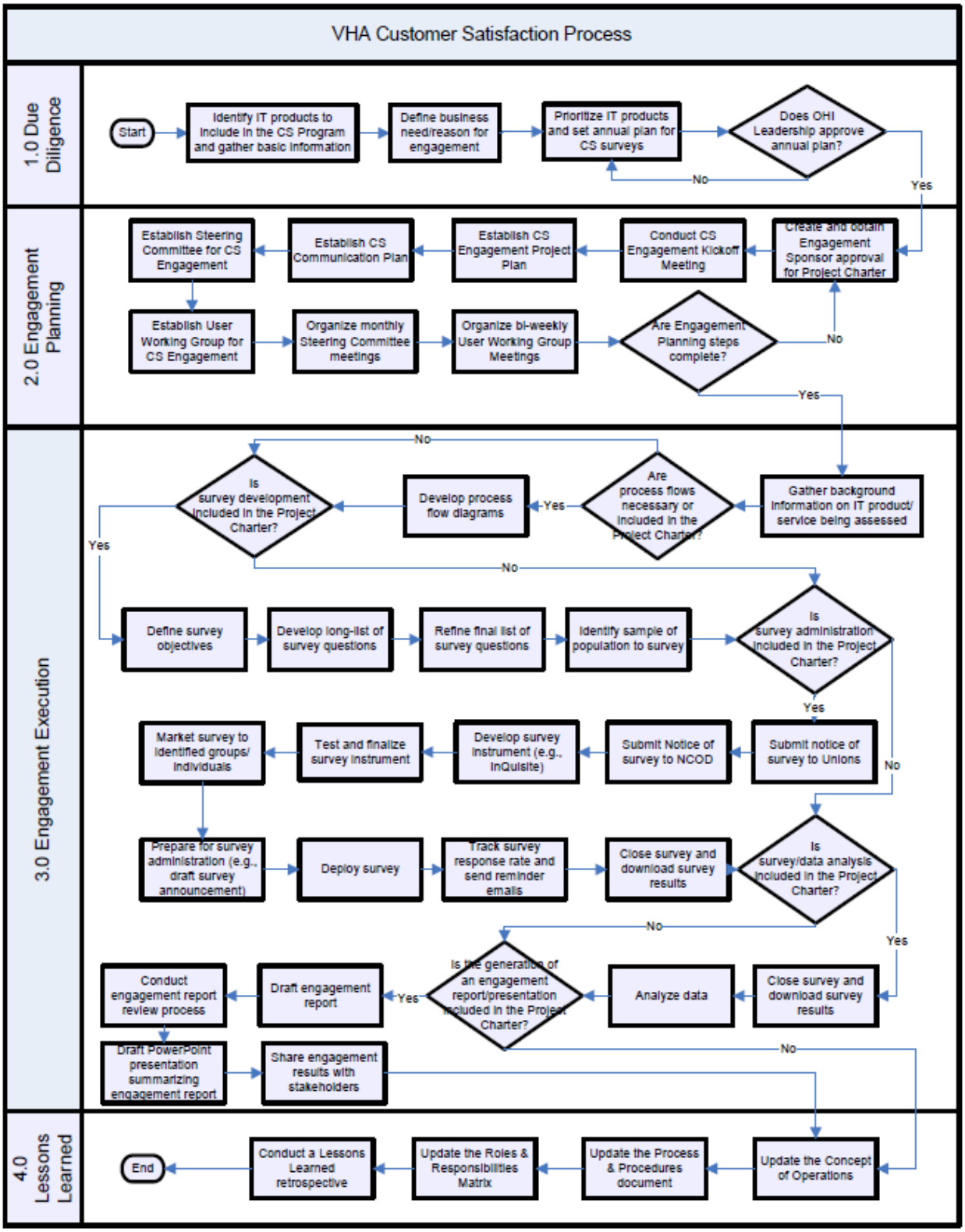
   4.0 Lessons Learned for a PE CS engagement

   In addition to the four (4) phases listed above, there are sub-phases and steps. A complete listing of the phases, sub-phases, and steps detailed in this document, please refer to the Table of Contents.

The format used for providing the detail of each step is based on a system/process use-case approach as follows:

Phase **Sub-Phase** **Step**	**X.0** **X.X** **X.X.X**
Notes	Only included if additional information is required for the phase, sub-phase, or step
Prerequisite Step	Step that serves as the immediate predecessor to this step
Step Actions	Detailed procedures to completing this step
Duration	Approximate timeframe to complete the step and associated step actions
Deliverable	Name(s) of all deliverables that should be generated once this step is completed
Sample(s)	Examples of artifacts used to facilitate the completion of the step and examples of completed deliverables
Follow-up Step	Step that serves as the immediate successor to this step
Tips for Success	Only included if lessons learned were applicable to help complete the step

2. CS Survey Process Flow



3. CS Engagement Process & Procedures

Phase **Sub-Phase** **Step**	**1.0 Due Diligence in Preparation for a PE CS Engagement** **1.1 N/A** **1.1.1 Set High Level Annual Plan for Customer Satisfaction**
Prerequisite Step	None
Step Actions	1. Work with VHA program offices and business owners to determine the annual demand for CS assessments 2. Prioritize the list of candidate CS IT products and services based on need and CS resource requirements 3. Work with OHI management and IT product/service business owners to define timeframes and solidify the CS pipeline 4. Review and obtain approval of final CS product pipeline with OHI management 5. Communicate with IT product/service business owners on estimated start dates for the CS engagement
Duration	~ 2 months
Deliverable	1. Annual CS Strategy and CS pipeline
Sample(s)	
Follow-up Step	1.1.2 Obtain project approval from VHA leadership

Phase **Sub-Phase** **Step**	**1.0 Due Diligence in Preparation for a PE CS Engagement** **1.1 N/A** **1.1.2 Obtain Engagement Approval from VHA Leadership**
Prerequisite Step	1.1.1 Set high level annual plan for Customer Satisfaction
Step Actions	1. Work with business owner(s) for the targeted IT product or service to confirm candidacy for CS engagement 2. Work with business owner(s) to identify the business need/reason for the CS engagement. Examples of needs/reasons for the CS engagement include: 2.1. Support an ROI analysis of the IT product/service 2.2. Provide VHA with means to make evidence-based decisions regarding the product/service's short- and long-term product viability 2.3. Support senior leadership's strategic IT planning by gathering supplemental user data 2.4. Reaffirm organization commitment to continuous improvement and to the IT product/service user base 2.5. Help (re)align IT priorities with end users' functional and technical

	requirements 2.6. Facilitate identification of VHA internal best practices and lessons learned 3. Obtain approval from the Chief Officer, VHA Office of Health Information, regarding candidate IT products/services for the CS engagement 4. Update CS Executive Presentation with product/service information 5. Review updated presentation with OHI Leadership
Duration	~ 2 months
Deliverable	1. Annual CS Strategy and CS pipeline
Sample(s)	CS - PE Customer Satisfaction Overview
Follow-up Step	2.1.1Obtain project approval from VHA leadership

Phase	**2.0 Engagement Planning Preparation for a PE CS Engagement**
Sub-Phase	**2.1 N/A**
Step	**2.1.1 Create and Obtain Approval for the CS Project Charter**
Prerequisite Step	1.1.2Obtain project approval from VHA leadership
Step Actions	1. Reference the sample Project Charter [Insert updated Project Charter below] and Project Charter template below when creating CS Project Charter 2. Draft Project Charter with new information relevant to the business owner(s) being engaged by the CS Team 2.1. Build document content to the extent possible 2.2. Insert the latest version of the CS Concept of Operations as an embedded object in the Project Charter document 3. Review Draft Project Charter with internal CS Team 4. Update Draft Project Charter to reflect internal CS Team's changes 5. Submit and review Draft Project Charter with CS Program Manager 6. Update Draft Project Charter to reflect CS Program Manager feedback 7. Submit and review Draft Project Charter with Engagement Sponsor 8. Update Draft Project Charter with Engagement Sponsor feedback 9. Obtain Chief Officer, VHA OHI approval 9.1. Submit Draft Project Charter to Staff Assistant to Chief Officer, VHA OHI 9.2. Receive Chief Officer, VHA OHI and his/her respective Staff Assistant's feedback on the Draft Project Charter 9.3. Update the and finalize Project Charter with Chief Officer, VHA OHI and his/her respective Staff Assistant's feedback 10. Submit Final Project Charter for signoff to the named approvers

	10.1. Required approvers may differ by engagement; however, approvers must always include the following individuals: 10.1.1. Chief Officer, VHA OHI 10.1.2. Director, Product Effectiveness 10.1.3. Program Manager, PE Customer Satisfaction 10.1.4. Representatives designated by the Engagement Sponsor 10.2. To obtain signoff from Chief Officer, VHA OHI, complete the following steps: 10.2.1. Complete and submit the Concurrence Summary Form (attached below for reference) 10.2.2. Attach and submit the Concurrence Summary Form along with the Final Project Charter to the Staff Assistant for the Chief Officer, VHA OHI 10.3. Electronic signatures (i.e., email confirmation) are considered adequate signoff 11. Once signoff is received: 11.1. Scan the completed signature page of the Project Charter 11.2. Attach any email/electronic approvals 11.3. PDF the Final Project Charter document along with the appropriate signatures and electronic approvals 11.4. Upload the Final Project Charter to the PE SharePoint site 12. If any individual to whom the Project Charter is submitted does not provide signatory approval within two (2) weeks following receipt of the Project Charter, the CS Team will consider that individual to have approved the Project Charter
Duration	~ 2 months depending on time required to obtain feedback, signoff, and the number of reviewers
Deliverable	1. Project Charter
Sample(s)	VHA PE Project Charter - VISN 23 Bio
Follow-up Step	2.1.2 Create CS Engagement Kickoff Meeting Presentation
Tips for Success	Clearly define the scope of the engagement. For example, if conducting a survey, will the CS Team issue a survey regarding the IT product's software components or will the survey encompass software and hardware components?

Phase	**2.0 Engagement Planning Preparation for a PE CS Engagement**
Sub-Phase	**2.1 N/A**
Step	**2.1.2 Create CS Engagement Kickoff Meeting Presentation**
Prerequisite Step	2.1.1 Create and obtain approval for the CS Project Charter
Step Actions	1. Reference the sample Kickoff Presentation template below when creating the Kickoff Presentation 2. Draft Kickoff Presentation Agenda 3. Review Agenda with internal CS Team 4. Update and finalize Agenda 5. Create Kickoff Meeting Presentation based on finalized Agenda 6. Submit and review Kickoff Presentation with CS Program Manager 7. Update Kickoff Presentation with CS Program Manger feedback 8. Identify Kickoff Meeting attendees from PE, Engagement Sponsor, and other interested stakeholders 8.1. Work with CS Program Manager and Engagement Sponsor to identify required meeting attendees 8.2. At the very least, attendees should include: 8.2.1. CS Program Manager 8.2.2. CS Engagement Project Manager 8.2.3. CS Engagement Team Members 8.2.4. Key representatives designated by the Engagement Sponsor 9. Schedule Kickoff Meeting 10. Identify meeting time and place (meeting can be conducted via conference call) 11. Set up a Veterans Affairs National Telecommunications System (VANTS) call-in line (1-800-767-1750) 12. Set up a Microsoft LiveMeeting to share the Kickoff Presentation (http://vaww.webmeeting.va.gov) 13. Send meeting invitation via email, including: 13.1. LiveMeeting and VANTS information 14. Hold Kickoff Meeting 15. Create meeting minutes and resulting action items 16. Distribute minutes and action items to meeting attendees 17. Upload the minutes and action items to the PE SharePoint site
Duration	1 – 2 weeks
Deliverable	1. Kickoff Meeting Presentation 2. Kickoff Meeting minutes 3. Kickoff Meeting action items
Sample(s)	BCMA Kickoff Meeting Presentation BCMA CS Kickoff Meeting Minutes 2008

Follow-up Step	2.1.3 Create CS Engagement Project Plan

Phase **Sub-Phase** **Step**	**2.0 Engagement Planning Preparation for a PE CS Engagement** **2.1 N/A** **2.1.3 Create CS Engagement Project Plan**
Prerequisite Step	2.1.2 Create CS Pilot Kickoff Meeting Presentation
Step Actions	1. Reference the sample Project Plan template below when creating the CS Project Plan 2. Draft CS Project Plan 2.1. Review tasks in the template below 2.2. Add/remove tasks as appropriate for each unique engagement 2.3. Review and adjust baseline start/finish dates for each task 2.4. Review and adjust task dependencies 2.5. Assign resources for each step in the Project Plan 2.6. Include all deliverables in the Project Plan 3. Review Project Plan with the CS Program Manager 4. Update Project Plan to reflect any feedback from the CS Program Manager 5. Submit and review Project Plan with Engagement Sponsor 6. Update and baseline Final Project Plan per Steering Committee comments 7. Distribute Final Project Plan to CS Team and Steering Committee 8. Update Project Plan to continuously track progress 8.1. Utilize the actual start/finish dates to track progress; allowing the CS Team to monitor actual vs. budgeted project schedule
Duration	~ 1 month
Deliverable	1. CS Project Plan
Sample(s)	Project Plan 2009-11-24.mpp
Follow-up Step	2.1.4 Develop CS Communication Plan

Phase **Sub-Phase** **Step**	**2.0 Engagement Planning Preparation for a PE CS Engagement** **2.1 N/A** **2.1.4 Develop CS Communication Plan**
Prerequisite Step	2.1.3 Create CS Engagement Project Plan
Step Actions	1. Reference the sample CS Communication Plan below when developing CS Communication Plan

	2. Draft the initial CS Communication Plan 3. CS Communication Plan should delineate the following elements: 3.1. Item requiring communication 3.2. Target Audience for each item requiring communication 3.3. Information sender for each item requiring communication 3.4. Timing or frequency for each item requiring communication 3.5. Communication vehicle(s) for each item requiring communication 4. CS Communication Plan should, at a minimum, cover the following items requiring communication: 4.1. Steering Committee meetings 4.2. User Working Group meetings 4.3. Internal CS Team status meetings 4.4. Communication/marketing of any survey(s) included in the engagement 4.5. Method of administering any survey(s) included in the engagement 4.6. Review of deliverables 4.7. Dissemination/communication of deliverables to stakeholders 5. Review CS Communication Plan with CS Program Manager 6. Update CS Communication Plan based on the CS Program Manager's feedback 7. Submit the CS Communication Plan based on feedback from the Steering Committee 8. Update and finalize CS Communication Plan based on feedback from the Steering Committee 9. Distribute final CS Communication Plan to CS Team 10. Distribute final CS Communication Plan to Steering Committee 11. Upload CS Communication Plan to the PE SharePoint site
Duration	~ 1 month
Deliverable	1. CS Communication Plan
Sample(s)	BCMA Communication Plan v
Follow-up Step	2.1.5 Organize monthly steering committee meeting

Phase	**2.0 Engagement Planning Preparation for a PE CS Engagement**
Sub-Phase	**2.1 N/A**
Step	**2.1.5 Organize Monthly Steering Committee Meeting**
Prerequisite Step	2.1.4 Develop CS Communication Plan
Step Actions	1. Validate composition of CS Steering Committee members 1.1. Steering Committee membership should be defined in CS Project Charter 1.2. Work with Engagement Sponsors to determine if Steering Committee

	membership requires alteration 1.3. Add addendum to Project Charter as necessary with revised Steering Committee membership 1.4. Obtain electronic approval or signoff from original Engagement Sponsor regarding updated Steering Committee membership 2. Schedule monthly Steering Committee Meetings 2.1. Set up a VANTS call-in line 2.2. Send meeting invitation via email Repeat the following steps for each Steering Committee Meeting: 3. Create Steering Committee Meeting Agenda 3.1. Refer to the sample Steering Committee Meeting Agenda below when creating Agenda 4. Submit Steering Committee Meeting Agenda to CS Program Manager 5. Update Steering Committee Meeting Agenda per CS Program Manager feedback 6. Distribute Steering Committee Meeting Agenda to Steering Committee members prior to meeting 7. Hold Steering Committee meeting 8. Compile meeting minutes and resulting action items 9. Distribute Steering Committee Meeting Minutes and Action Items to meeting invitees 10. Upload the minutes and action items to the PE SharePoint site
Duration	~ 1 month
Deliverable	1. Steering Committee Meeting Agenda 2. Steering Committee Meeting Minutes and Action Items
Sample(s)	BCMA Strng Comtee Agenda 2008-11-19.(BCMA CS SC Meeting Minutes 2008-11-19.(
Follow-up Step	2.1.6 Organize bi-weekly User Working Group Meetings
Tips for Success	Ad-hoc Steering Committee Meetings may be necessary, depending on the engagement. The Steering Committee often assists the CS Team revise the survey to a final set of questions. During the survey design process, the CS Team may need to meet with the Steering Committee more frequently than once per month.

Phase	**2.0 Engagement Planning Preparation for a PE CS Engagement**
Sub-Phase	**2.1 N/A**
Step	**2.1.6 Organize Bi-Weekly User Working Group Meetings**
Prerequisite Step	2.1.5 Organize monthly Steering Committee Meeting
Step Actions	1. Identify composition of CS User Working Group 1.1. Identify groups that utilize or impact key functions of the IT product/service being assessed (e.g., primary end-users, super users, support personnel, quality assurance personnel, etc.) 1.2. Work with the Steering Committee to identify specific individuals within the defined groups 1.3. Work with Steering Committee members to reach out to the identified individuals 1.4. Create a contact list of all User Working Group members 2. Establish User Working Group 2.1. Obtain approval from the Steering Committee for the composition of the User Working Group 3. Schedule bi-weekly User Working Group Meeting 3.1. Set up a VANTS call-in line 3.2. Send meeting invitation via email Repeat the following steps for each User Working Group Meeting: 4. Create User Working Group Meeting Agenda 4.1. Refer to the sample User Working Group Meeting Agenda below when creating Agenda 5. Submit User Working Group Meeting Agenda to CS Program Manager 6. Update User Working Group Meeting Agenda per CS Program Manager feedback 7. Distribute User Working Group Meeting Agenda to User Working Group members prior to meeting 8. Hold User Working Group meeting 9. Compile meeting minutes and resulting action items 10. Distribute User Working Group Meeting Minutes and Action Items to meeting invitees 11. Upload the minutes and action items to the PE SharePoint site
Duration	~ 1 month
Deliverable	1. User Working Group Meeting Agenda 2. User Working Group Meeting Minutes and Action Items
Sample(s)	BCMA UWG Agenda 2008-11-17.docx BCMA CS UWG Meeting Minutes 2008
Follow-up	3.1.1 Gather background information on IT product/service being assessed

Step	
Tips for Success	Once the engagement is fully underway, revisit the need to have bi-weekly User Working Group Meetings. Often, the User Working Group assists the CS Team understand the IT product/service environment and craft initial survey questions. However, once the CS Team is closer to the survey deployment date or into data analysis, User Working Group meetings may not need to occur as frequently.

Phase	**3.0 Engagement Execution for a PE CS Engagement**
Sub-Phase	**3.1 Product/Service Deep Dive**
Step	**3.1.1 Gather Background Information on IT Product/Service Being Assessed**
Prerequisite Step	2.1.6 Organize bi-weekly User Working Group Meetings
Step Actions	1. Conduct research on the IT product/service via the VA intranet and world wide web 1.1. Search the IT product/service intranet site (if available) 1.2. Utilize the VA search engine to identify other information on the IT product/service available on the VA intranet 1.3. Utilize web-based search engines to identify other information on the IT product/service available on the internet 2. Work with Steering Committee and User Working Group members to obtain artifacts relating to the IT product/service being assessed; artifacts may include: 2.1. Existing process-flow diagrams 2.2. Requirements documents 2.3. Previously conducted data calls or surveys 2.4. Strategic plans 2.5. Training presentations/documents 2.6. New Service Requests (NSRs) 3. Schedule one-on-one meetings with User Working Group members to obtain more in-depth information about aspects of the IT product/service. 4. Conduct site visits to view the IT product/service being assessed in its production environment 4.1. Work with Steering Committee members or User Working Group members to schedule site visits 4.2. If travel is required, contact the PE Director to verify travel funding is available. 4.3. Schedule travel plans (e.g., plane ticket, hotel, etc.) to attend face-to-face meetings 4.4. In preparation of site visits, prepare documentation to guide the meeting 4.4.1. Prepare a Site Visit Agenda (reference the sample Site Visit Agenda template below) 4.4.2. Prepare other questions for on-site interviews, as necessary

	4.4.3. Print other relevant materials for reference during travel and during on-site interviews 4.5. Travel to facility/facilities where site visit(s) will be conducted 4.6. Request contact information from all users in case follow-up questions are necessary 4.7. Compile detailed site-visit notes 4.8. Email/call users with follow-up questions as necessary 4.9. Submit the site-visit notes to the appropriate users for feedback 4.10. Revise site-visit notes per user feedback 5. Review and analyze gathered information with the internal CS Team 6. Upload meeting minutes and relevant artifacts obtained to the PE SharePoint site
Duration	~ 2 months
Deliverable	1. Site Visit Meeting Agenda(s) 2. Site Visit Meeting Minutes
Sample(s)	Dallas Site Visit Agenda 2008-09-24.(Dallas - John Sum-Ping Meeting Mir
Follow-up Step	3.1.2 Develop process flow diagrams
Tips for Success	

Phase	**3.0 Engagement Execution for a PE CS Engagement**
Sub-Phase	**3.1 Product/Service Deep Dive**
Step	**3.1.2 Develop Process Flow Diagrams[1]**
Notes	1. Depending on the scope of the engagement, Process Flow Diagrams may not be created. Additionally, Process Flow Diagrams can be the final deliverable assembled for a CS engagement if the Engagement Sponsor requests such an effort. The scope of the CS engagement should be captured in the Project Charter.
Prerequisite Step	3.1.1 Gather background information on product being assessed
Step Actions	1. Reference the sample Process Flow Diagram template below 2. Compile Process Flow Diagrams based on the information gleaned in the prior step 3. Submit the Process Flow Diagrams to the CS Program Manager 4. Update the Process Flow Diagrams per the CS Program Manager's feedback 5. Review the Process Flow Diagrams with the User Working Group 6. Update the Process Flow Diagrams per the User Working Group's feedback 7. Submit the Process Flow Diagrams to the Steering Committee

	8. Update the Process Flow Diagrams per Steering Committee feedback 9. Upload the Process Flow Diagrams to the PE SharePoint site
Duration	~ 1 month
Deliverable	1. Process Flow Diagrams
Sample(s)	Overall BCMA Process Flow v7.vsd Linked FBCS Process Flowv4.vsd
Follow-up Step	3.2.1 Define Survey Objectives

Phase **Sub-Phase** **Step**	**3.0 Engagement Execution for a PE CS Engagement** **3.2 Survey Development** **3.2.1 Define Survey Objectives**
Notes	1. Depending on the scope of the engagement, a survey may not be created. Additionally, a finalized survey instrument can be the final deliverable for a CS engagement if the Engagement Sponsor request such an effort. The scope of the CS engagement should be captured in the Project Charter.
Prerequisite Step	3.1.2 Develop process flow diagrams
Step Actions	1. Review the information gleaned from steps 3.1.1 and 3.1.2 2. Reference the sample Survey Objectives Summary template below when defining survey objectives 3. Draft objectives that the survey should accomplish (e.g., Measure satisfaction levels with XYZ software and identify aspects of XYZ software that warrant improvements or enhancements) 4. Submit Draft Survey Objectives to the CS Program Manager 5. Updated Draft Survey Objectives per CS Program Manager feedback 6. Schedule a meeting with the Steering Committee 7. Review Draft Survey Objectives with the Steering Committee 8. Revise Survey Objectives per Steering Committee feedback 9. Email Final Survey Objectives Summary to Steering Committee
Duration	~ 2 weeks
Deliverable	1. Survey Objectives Summary
Sample(s)	BCMA National Survey Question Wor
Follow-up Step	3.2.2 Identify Sample of Population to Survey

Phase	**3.0 Engagement Execution for a PE CS Engagement**
Sub-Phase	**3.2 Survey Development**
Step	**3.2.2 Develop Long-List of Survey Questions**
Prerequisite Step	3.2.1 Define survey objectives
Step Actions	1. Reference the sample Long-List of Survey Questions template below when developing Long-List of Survey Questions 2. Utilizing information gleaned from steps 3.1.1 and 3.1.2 draft survey questions for each survey objective developed in step 3.2.1 3. Break the survey population into subgroups (e.g., end-users, managers, technical support personnel, etc.) 4. Identify the survey population subgroups that will receive each question 5. Submit the Long-List of Survey Questions to the CS Program Manager 6. Update the Long-List of Survey Questions per CS Program Manager feedback
Duration	~ 2 weeks
Deliverable	1. Long-List of Survey Questions
Sample(s)	See sample for Step 3.2.1
Follow-up Step	3.2.3 Refine Final List of Survey Questions
Tips for Success	

Phase	**3.0 Engagement Execution for a PE CS Engagement**
Sub-Phase	**3.2 Survey Development**
Step	**3.2.3 Refine Final List of Survey Questions**
Prerequisite Step	3.2.2 Develop Long-List of Survey Questions
Step Actions	1. Schedule a Survey Question Working Session with the User Working Group. 1.1. The length of the Working Session will vary depending on the length of the Long-List of Survey Questions 1.2. Multiple Survey Question Working Sessions may be necessary 1.3. Depending on the engagement, Survey Question Working Sessions may be easier facilitate with a subset of the User Working Group (or a subset of the Steering Committee) 2. Disseminate the Survey Objectives Summary and the Long-List of Survey Questions to User Working Group members prior to the meeting. 3. Hold the Survey Question Working Session 3.1. Review each survey question 3.2. For each survey question, determine the following: 3.2.1. The survey question is being presented to the appropriate

	subgroup(s) 3.2.2. The survey question is clearly and correctly worded 3.2.3. The survey question is necessary (i.e., should the question be removed completely?) 4. Revise Long-List of Survey Questions per Survey Question Working Session feedback 5. Submit refined survey questions to Steering Committee 6. Finalize list of survey questions per Steering Committee feedback 7. Disseminate Final List of Survey Questions to User Working Group
Duration	~ 2 weeks
Deliverable	1. Final List of Survey Questions
Sample(s)	FINAL - BCMA Survey Questions 20:
Follow-up Step	3.2.4 Identify Sample of Population to Survey

Tips for Success	Survey questions should follow the following guidelines:
	• Utilize clear, concise wording
	• Avoid the use of conjunctions
	  ○ Do not ask, 1) "How satisfied are you with X and Y?"
	  ○ Instead, 1) "How satisfied are you with X?" 2) "How satisfied are you with Y?"
	• Experiment with different scales, such as agreement (utilize the scale that provides the best data)
	  ○ E.g., "How strongly do you agree with the following statement..."
	• Consider developing categories for free-response questions that allow respondents to self categorize their responses (this allows for easier data analysis)
	  ○ E.g., "What is one change to X that would improve your satisfaction? (Please provide a free-response comment and select the category/categories that your comment relates to)"

Phase	**3.0 Engagement Execution for a PE CS Engagement**
Sub-Phase	**3.2 Survey Development**
Step	**3.2.4 Identify Sample of Population to Survey**
Prerequisite Step	3.2.3 Refine final list of survey questions
Step Actions	1. Work with User Working Group and Steering Committee to determine if a comprehensive list of users exists 2. If a comprehensive list of users exists, review the list for the following:

	2.1. Subgroups (e.g., end-users, technical support personnel, etc.) 2.2. Determine if additional individuals/groups should be added to the survey population based on the survey objectives 3. If a comprehensive list of users does not exist, develop an estimated survey population figure 3.1. Refer to the sample Target Response Rate Estimate template below 3.2. Utilize the HR ProClarity data cube available on [Insert intranet site] 4. Submit the estimated survey population figure to the CS Program Manager 5. Update the estimated survey population figure per the CS Program Manager's feedback 6. Submit the revised estimated survey population figure to the User Working Group 7. Revise the estimated survey population figure per User Working Group feedback 8. Determine the responses required for statistical significance 8.1. Refer to the sample Target Response Rate Estimate template below 8.2. Also refer to the following website: http://www.surveysystem.com/sample-size-formula.htm 8.3. Determine the Z-score for the CS Team's desired confidence level 8.3.1. 90% confidence = 1.64 8.3.2. 95% confidence = 1.96 8.3.3. 99% confidence = 2.57 8.4. Determine the appropriate confidence interval 8.5. Keep the percentage of respondents picking a choice at .5 for the most conservative estimate 9. Develop the survey sample size required to obtain statistical significance 9.1. The sample Target Response Rate Estimate template and the formula provided by the website in step 4.2 above generate the smallest sample size required for statistical significance (within the parameters set by the CS Team) 9.2. The CS Team should administer the survey to a sample large enough to garner the minimum response rate required for statistical significance 9.3. A 15% response rate should be utilized as a guideline; however, this response rate can vary depending on the level of marketing performed as well as the level of interest displayed by the Engagement Sponsor 10. Submit the survey sample size to the CS Program Manager for review 11. Update the survey sample size per the CS Program Manager's feedback 12. Submit the revised survey sample size to the User Working Group for feedback 13. Update the survey sample size per User Working Group feedback
Duration	~ 1 week
Deliverable	1. Survey Sample Workbook

Sample(s)	BCMA National Target Response Rat
Follow-up Step	3.3.1 Develop long-list of survey questions

Phase	**3.0 Engagement Execution for a PE CS Engagement**
Sub-Phase	**3.3 Survey Deployment Preparation[1]**
Step	**3.3.1 Submit Notice of Survey to Unions[2]**
Notes	1. Depending on the scope of the engagement, a survey may not be created. Additionally, a finalized survey instrument can be the final deliverable for a CS engagement if the Engagement Sponsor request such an effort. The scope of the CS engagement should be captured in the Project Charter. 2. According to representatives at Labor Management Relations that have worked with the CS Team, union "approval" is not required to deploy a CS survey. Notice of the survey is required (details that should be included in the notice are included below). Additionally, unions can present questions are request changes to the survey. However, no formal approval is typically obtained from union representatives.
Prerequisite Step	3.2.4 Identify Sample of Population to Survey
Step Actions	1. Identify the appropriate Labor Management Relations (LMR) Representative to work with 1.1. Currently, the LMR Representative the CS Team works with is Douglas Katcher (douglas.katcher@va.gov) 1.2. LMR's website is http://www1.va.gov/lmr/ 2. Draft an email to the LMR Representative providing notice of the CS survey 2.1. Reference the Sample LMR Email – Request for Union Approval below 2.2. Include the following information in the email: 2.2.1. Purpose of Survey 2.2.2. Intended Audience 2.2.3. Proposed Administration Dates 2.2.4. Method of Survey 2.2.5. Copy of Survey (i.e., actual survey questions) 3. Verify that the LMR Representative received the email and forwarded the notice to the national union representatives 4. Discuss further union requirements with the Steering Committee 5. Address any further union requirements identified 6. The CS Team should wait a minimum of six weeks after notice has been sent to the national unions before deploying the survey 6.1. This will allow national union representatives to direct questions and comments to the CS Team

Duration	~ 6 weeks
Deliverable	1. Notice of Survey to Unions
Sample(s)	Sample LMR Email -Notice to Unions of C
Follow-up Step	3.3.2 Submit notice of survey to National Center for Organization Development (NCOD)

Phase	**3.0 Engagement Execution for a PE CS Engagement**
Sub-Phase	**3.3 Survey Deployment Preparation**
Step	**3.3.2 Submit Notice of Survey to National Center for Organizational Development (NCOD)**
Prerequisite Step	3.3.1 Submit notice of survey to unions
Step Actions	1. Identify the appropriate contacts at the NCOD 1.1. The CS Team has previously worked with the following individuals: 1.1.1. Sue Dyrenforth, NCOD Director 1.1.2. Jeremy Rickert, NCOD Director of Operations 1.2. NCOD's intranet site is http://vaww1.va.gov/NCOD/index.asp 2. Draft an email to the appropriate NCOD contacts notifying them of the CS survey 2.1. The email should include: 6.1.1. Purpose of Survey 6.1.2. Intended Audience 6.1.3. Proposed Administration Dates 6.1.4. Method of Survey 3. Confirm that NCOD has received notice of the survey and follow-up as necessary
Duration	~ 1 week
Deliverable	1. Notice of Survey to NCOD
Sample(s)	Sample NCOD Email.msg
Follow-up Step	3.3.3 Develop survey instrument

Phase **Sub-Phase** **Step**	**3.0 Engagement Execution for a PE CS Engagement** **3.3 Survey Deployment Preparation** **3.3.3 Develop Survey Instrument[1]**
Notes	1. The final survey instrument can be paper-based, web-based, delivered in person, or delivered over the phone. The steps included below cover a web-based survey instrument created with the VA's InQuisite survey tool.
Prerequisite Step	3.3.2 Submit notice of survey to National Center for Organizational Development (NCOD)
Step Actions	1. Obtain the InQuisite Survey Builder application 1.1. Submit a survey license request using the VA's Survey License Request Tracker – http://vaww1.va.gov/surveylictracker/ 1.2. Follow-up with the Survey License Administrator (surveylictracker@med.va.gov) if you do not hear back within one week 2. Develop the survey using the InQuisite Survey Builder application 2.1. Review the InQuisite User Guide to become familiar with the system 2.2. Visit the InQuisite Learning Center for additional information – http://vaww.survey.va.gov/help/index.html?Inquisite_Learning_Center.htm 2.3. Direct questions to surveylictracker@med.va.gov
Duration	~ 2 weeks
Deliverable	1. Draft survey instrument
Sample(s)	BCMA Survey v30.iqs
Follow-up Step	3.3.4 Test and finalize survey instrument

Phase **Sub-Phase** **Step**	**3.0 Engagement Execution for a PE CS Engagement** **3.3 Survey Deployment Preparation** **3.3.4 Test and Finalize Survey Instrument[1]**
Notes	1. The final survey instrument can be paper-based, web-based, delivered in person, or delivered over the phone. The steps included below cover a web-based survey instrument created with the VA's InQuisite survey tool.
Prerequisite Step	3.3.3 Develop survey instrument
Step Actions	1. Determine the various survey paths that can be taken by respondents. 2. Create an internal testing schedule 2.1. Ensure all paths are tested 3. Internally test the draft survey instrument 3.1. Document any issues, discrepancies, misspellings, etc.

	3.2. Ensure that the survey data is properly captured in the InQuisite database 3.3. Test the survey utilizing various screen resolutions, and ensure the entire survey fits on lower screen resolutions (InQuisite does not reformat the survey to fit selected screen resolutions) 4. Update the survey instrument based on the documented internal testing results 5. Disseminate the survey instrument to the User Working Group 5.1. Request that the User Working Group members take the survey path most applicable to their job functions 5.2. Request that the User Working Group members document any issues with the survey instrument 5.3. Ensure that the survey data is properly captured in the InQuisite database 6. Update the survey instrument based on User Working Group feedback 7. Submit the survey to the CS Program Manager for feedback 7.1. Request that the CS Program Manager take the survey utilizing multiple paths 8. Update the survey instrument based on CS Program Manager Feedback 9. Finalize the survey instrument
Duration	~ 1 weeks
Deliverable	1. Finalized survey instrument
Sample(s)	See sample for step 3.3.3
Follow-up Step	3.3.5 Market Survey

Phase	**3.0 Engagement Execution for a PE CS Engagement**
Sub-Phase	**3.3 Survey Deployment Preparation**
Step	**3.3.5 Market Survey[1]**
Notes	1. The level and type of survey marketing will depend on the survey delivery method.
Prerequisite Step	3.3.4 Test and finalize survey instrument
Step Actions	1. Work with the Steering Committee and User Working Group to identify the following: 1.1. Individuals who are willing to market the survey 1.1.1. The CS Team should attempt to identify individuals in leadership positions who can effectively communicate the survey to many constituents (e.g., Nurse Managers, Pharmacy Managers, VISN Directors, Chief Officers for program offices, etc.) 1.2. VA intranet sites that are beneficial for posting the survey link 1.3. Applicable, regularly scheduled conference calls during which the CS Team can market the survey 1.3.1. E.g., For the BCMA survey, the CS Team presented on the monthly National Nurse Executives Call to market the survey

	2. Contact individuals identified in step 1.1 to request their assistance in marketing the survey 2.1. Initially, draft an email communication that includes the following: 2.1.1. The missions of the PE and CS programs 2.1.2. The purpose of the survey 2.1.3. Assurance that the survey will be confidential and anonymous 2.1.4. Assurance that the survey has been reviewed by LMR, NCOD, and the national unions 2.1.5. Assurance that the survey is supported by the Engagement Sponsor 2.1.6. Explanation of what will be required from the individual 2.2. Follow-up via phone if a response is not received within one (1) week 3. Identify webmasters/web support teams for intranet sites identified in step 1.2 4. Contact the identified webmasters/web support teams to request their assistance in posting the link 4.1. Initially, draft an email communication that includes the following: 4.1.1. The missions of the PE and CS programs 4.1.2. The purpose of the survey 4.1.3. Assurance that the survey will be confidential and anonymous 4.1.4. Assurance that the survey has been reviewed by LMR, NCOD, and the national unions 4.1.5. Assurance that the survey is supported by the Engagement Sponsor 4.1.6. Explanation of what will be required from the individual(s) 4.2. Follow-up via phone if a response is not received within one (1) week 5. Track the individuals and intranet sites willing to assist in marketing the survey 6. Identify the individual(s) responsible for coordinating the conference call(s) identified in step 1.3 7. Contact the individual(s) responsible for coordinating the conference call(s) 7.1. Initially, draft an email communication that includes the following: 7.1.1. The missions of the PE and CS programs 7.1.2. The purpose of the survey 7.1.3. Assurance that the survey will be confidential and anonymous 7.1.4. Assurance that the survey has been reviewed by LMR, NCOD, and the national unions 7.1.5. Assurance that the survey is supported by the Engagement Sponsor 7.1.6. Request to present at the applicably scheduled conference call 7.2. Follow-up via phone if a response is not received within one (1) week 8. Create a presentation for the conference call(s) willing to allow the CS Team to present 8.1. Create a draft PowerPoint presentation 8.1.1. Ensure that the presentation can be covered in the allotted

	presentation time 8.1.2. Allow time for questions 8.2. Submit the draft PowerPoint to the CS Program Manager for feedback 8.3. Revise the PowerPoint per CS Program Manager feedback 8.4. Submit the PowerPoint presentation to the conference call organizer(s) 9. Present at the scheduled conference call(s) identified in step 1.3 9.1. Follow-up, as necessary, with any individuals who had further questions 10. Approximately one (1) week prior to survey deployment, email the individuals contacted in step 2 with an email advertising the survey deployment 10.1. Draft an email that the individuals can forward directly to their constituents 10.2. The email should include: 10.2.1. The purpose of the survey 10.2.2. Assurance that the survey will be confidential and anonymous 10.2.3. Assurance that the survey has been reviewed by LMR, NCOD, and the national unions 10.2.4. Assurance that the survey is supported by the Engagement Sponsor 10.2.5. Date that the survey will be available 10.2.6. Approximate amount of time to complete the survey 10.2.7. Occupational roles requested to take the survey 11. Approximately one (1) week prior to survey deployment, email the individuals contacted in step 4 with an email advertising the survey deployment 11.1. Draft information that can be posted directly to the intranet site 11.2. The email should include: 11.2.1. The purpose of the survey 11.2.2. Assurance that the survey will be confidential and anonymous 11.2.3. Date that the survey will be available 11.2.4. Approximate amount of time to complete the survey
Duration	~ 1 month
Deliverable	1.
Sample(s)	BCMA Survey PPT for 2010-03-01 Call v BCMA National Survey Posting.docx Sample Request for Survey Link Assistanc PE Paragraph for Baltimore Newsletter.
Follow-up Step	3.3.6 Prepare for survey administration

Phase	**3.0 Engagement Execution for a PE CS Engagement**
Sub-Phase	**3.3 Survey Deployment Preparation**
Step	**3.3.6 Prepare for Survey Administration[1]**
Notes	1. The final survey instrument can be paper-based, web-based, delivered in person, or delivered over the phone. The steps included below cover a web-based survey instrument created with the VA's InQuisite survey tool.
Prerequisite Step	3.3.5 Market survey
Step Actions	1. Draft an email for survey respondents who will be receiving the survey link directly 1.1. The email should include the following: 1.1.1. The purpose of the survey 1.1.2. Assurance that the survey will be confidential and anonymous 1.1.3. Assurance that the survey has been reviewed by LMR, NCOD, and the national unions 1.1.4. Assurance that the survey is supported by the Engagement Sponsor 1.1.5. Approximate amount of time to complete the survey 1.1.6. Date the survey will close 1.1.7. Survey link 1.2. Submit the email to the CS Program Manager for review 1.3. Update the email per CS Program Manager feedback 1.4. Upload the survey to the InQuisite server 2. Draft an email for individuals who will forward the survey link to their constituents 2.1. The email should include the same information included in step action 1.1 3. Draft an email for the webmasters/web support teams that will post the survey link to identified intranet sites 3.1. The email should include the following: 3.1.1. The purpose of the survey 3.1.2. Assurance that the survey will be confidential and anonymous 3.1.3. Approximate amount of time to complete the survey 3.1.4. Date the survey will close 3.1.5. Survey link
Duration	~ 1 day
Deliverable	1. Survey Deployment Email
Sample(s)	ICIP Survey Email v1.docx Sample BCMA Survey Announcement.msg Sample BCMA Survey Announcement 2.msg
Follow-up Step	3.4.1 Deploy web-based survey

Phase **Sub-Phase** **Step**	**3.0 Engagement Execution for a PE CS Engagement** **3.4 Survey Administration[1]** **3.4.1 Deploy Web-Based Survey[2]**
Notes	1. Depending on the scope of the engagement, a survey may not be created. Additionally, a finalized survey instrument can be the final deliverable for a CS engagement if the Engagement Sponsor request such an effort. The scope of the CS engagement should be captured in the Project Charter. 2. The final survey instrument can be paper-based, web-based, delivered in person, or delivered over the phone. The steps included below cover a web-based survey instrument created with the VA's InQuisite survey tool.
Prerequisite Step	3.3.6 Prepare for survey administration
Step Actions	1. Send email finalized in step 5.6 to respondents receiving the survey link directly 2. Send email finalized in step 5.6 to individuals forwarding the link on to their constituents 3. Send email finalized in step 5.6 to webmasters/web support teams posting the link to intranet sites 4. Follow-up on any questions presented to the CS Team
Duration	~ 1 day
Deliverable	1. Deployed survey
Sample(s)	
Follow-up Step	3.4.2 Track survey response rate and send reminder emails

Phase **Sub-Phase** **Step**	**3.0 Engagement Execution for a PE CS Engagement** **3.4 Survey Administration[1]** **3.4.2 Track Survey Response Rate and Send Reminder Emails**
Notes	1. The final survey instrument can be paper-based, web-based, delivered in person, or delivered over the phone. The steps included below cover a web-based survey instrument created with the VA's InQuisite survey tool.
Prerequisite Step	3.4.1 Deploy web-based survey
Step Actions	1. Near the end of each week that the survey is open, download the survey results from InQuisite 2. Calculate the number of completed surveys received by: 2.1. Role 2.2. VISN 2.3. VAMC 2.4. Other applicable metrics

	3. Draft reminder emails for the individuals who received emails in Step 3.4.1 3.1. Include the response rate for the applicable group/location in the email 4. Send reminder emails on Monday or Tuesday morning of the following week 5. Determine if additional marketing efforts need to be undertaken based on survey response rates
Duration	~ 4 weeks
Deliverable	1. Reminder emails
Sample(s)	Survey reminder 2008-12-10.doc Sample BCMA Survey Reminder.msg
Follow-up Step	3.4.3 Close survey and download survey results

Phase **Sub-Phase** **Step**	**3.0 Engagement Execution for a PE CS Engagement** **3.4 Survey Administration[1]** **3.4.3 Close Survey and Download Survey Results**
Notes	1. The final survey instrument can be paper-based, web-based, delivered in person, or delivered over the phone. The steps included below cover a web-based survey instrument created with the VA's InQuisite survey tool.
Prerequisite Step	3.4.2 Track survey response rate and send reminder emails
Step Actions	1. Close the InQuisite server 2. Download survey results in MS Access format, .CSV format, and MS Excel format 3. Ensure the results are saved and appropriately backed-up
Duration	~ 1 day
Deliverable	1. Raw survey results
Sample(s)	Omitted due to size
Follow-up Step	3.5.1 Format data for analysis

Phase **Sub-Phase** **Step**	**3.0 Engagement Execution for a PE CS Engagement** **3.5 Survey/Data Analysis[1]** **3.5.1 Format Data for Analysis[2]**
Notes	1. Survey/data analysis can be offered as a stand-alone service provided by the CS Team. Additionally, the CS engagement may not include the survey/data analysis sub-phase. The scope of the CS engagement should be captured in the Project Charter. 2. Data may be presented to the CS Team in a number of formats. The steps below focus on formatting data that has been downloaded from the VA's InQuisite survey tool.
Prerequisite Step	3.4.3 Close survey and download survey results
Step Actions	1. Format downloaded results so they can be appropriately analyzed using MS Excel, MS Access, and/or additional data analysis applications 2. Create an audit program to ensure the formatted data maintains the integrity of the initial raw results 2.1. This can involve testing a sample of formatted results and tracing the sample results back to the initial raw results 2.2. This can also involve creating formulas to test the formatted survey results for data integrity 3. Save the formatted survey results/data as a separate file
Duration	~ 1 week
Deliverable	1. Formatted data/survey results
Sample(s)	BCMA Ntnl Survey Results - Final.xlsx
Follow-up Step	3.5.2 Analyze data

Phase **Sub-Phase** **Step**	**3.0 Engagement Execution for a PE CS Engagement** **3.5 Survey/Data Analysis[1]** **3.5.2 Analyze Data[2]**
Notes	1. Survey/data analysis can be offered as a stand-alone service provided by the CS Team. Additionally, the CS engagement may not include the survey/data analysis sub-phase. The scope of the CS engagement should be captured in the Project Charter. 2. Data may be presented to the CS Team in a number of formats. The steps below focus on formatting data that has been downloaded from the VA's InQuisite survey tool.
Prerequisite	3.6.1 Draft Engagement Report

Step	
Step Actions	1. Utilize the formatted data/survey results developed in Step 3.5.1 2. Create high-level summary tables that display (but are not limited to) the following information: 2.1. Mean, median, mode, and standard deviation for each survey question 2.2. Mean, median, mode, and standard deviation for each group of questions (e.g., questions related to XYZ software) 2.3. Mean, median, mode, and standard deviation for each respondent group (e.g., role, VISN, VAMC, etc.) 2.4. Additional key statistics for each respondent group 3. Meet internally with the CS Team to review the high-level summary tables and determine where in-depth analyses should focus 4. Draft a detailed schedule for analyzing survey results 5. Meet with the CS Program Manager to discuss the high-level summary tables and the schedule for analyzing survey results 6. Revise the schedule for analyzing survey results based on CS Program Manager feedback 7. Follow the schedule for analyzing survey results 7.1. Create graphs, pivot tables, and charts as necessary 8. Record any significant findings
Duration	~ 1 month
Deliverable	1. Data analysis workbooks/database
Sample(s)	Omitted due to size
Follow-up Step	3.6.1 Draft engagement report

Phase **Sub-Phase** **Step**	**3.0 Engagement Execution for a PE CS Engagement** **3.6 Engagement Report/Presentation Generation** **3.6.1 Draft Engagement Report**
Notes	1. Engagement report/presentation generation can be offered as a stand-alone service provided by the CS Team. Additionally, the CS engagement may not include the engagement report/presentation generation sub-phase. The scope of the CS engagement should be captured in the Project Charter.
Prerequisite Step	3.5.2 Analyze data
Step Actions	1. Draft an outline of the engagement report 1.1. Utilize the significant findings recorded in Step 3.5.2 1.2. Previous engagement reports have included the following sections: 1.2.1. Purpose, Background, and Approach 1.2.2. Overview of Survey Respondents by Role and VISN 1.2.3. Key Strengths 1.2.4. Key Areas for Improvement

	1.2.5. Conclusion 1.2.6. Recommendations 1.2.7. Detailed Analysis of Results 1.2.8. Appendices 1.3. Consider organizing the report based on the survey objectives finalized in Step 3.2.1 2. Review the outline with the internal CS Team 3. Schedule a meeting with the CS Program Manager 4. Review the report outline with the CS Program Manager 5. Update the outline per CS Program Manager feedback 6. Draft the Engagement Report 6.1. Consider utilizing a publication program (such as MS Publisher) to enhance the look of the report
Duration	~ 1 month
Deliverable	1. Draft Engagement Report
Sample(s)	BCMA Final Report Outline - Combined.d
Follow-up Step	3.5.2 Analyze data
Tips for Success	Depending on the engagement, the CS Team may also want to review the report (as it is being developed) with the Steering Committee or Engagement Sponsor. The Steering Committee may feel more involved in the process if they can contribute to the engagement report. However, this may lead to additional analysis and report sections.

Phase	**3.0 Engagement Execution for a PE CS Engagement**
Sub-Phase	**3.6 Engagement Report/Presentation Generation**
Step	**3.6.2 Conduct Engagement Report Review Process**
Notes	1. Engagement report/presentation generation can be offered as a stand-alone service provided by the CS Team. Additionally, the CS engagement may not include the engagement report/presentation generation sub-phase. The scope of the CS engagement should be captured in the Project Charter.
Prerequisite Step	3.6.1 Draft engagement report
Step Actions	1. Establish a review schedule 1.1. Ensure reviews are provided by the following individuals/groups: 1.1.1. Internal CS Team 1.1.2. CS Program Manager 1.1.3. PE Director 1.1.4. Steering Committee

	1.2. Ensure the schedule provides adequate time for each party to review the report and also provides adequate time for the CS Team to make revisions based on feedback 2. Execute the review schedule 2.1. Allow each party to review the report 2.2. Utilize a spreadsheet/document to track version updates 2.3. Revise the report as necessary 3. Finalize the Engagement Report 3.1. Convert the source document(s) to PDF format 4. Upload the Engagement Report to the PE SharePoint site
Duration	~ 1 month
Deliverable	1. Final Engagement Report
Sample(s)	BCMA National PE CS Survey - Report of Fi BCMA Ntnl PE CS Survey Final Report - BCMA Presentation of Pilot Survey Result Mill Bill Customer Satisfaction Final Rep
Follow-up Step	3.6.3 Draft PowerPoint presentation
Tips for Success	Manage Engagement Sponsor expectations regarding the level of analysis that will be included in the Engagement Report as well as the level of changes that will be incorporated based on the Engagement Sponsor's feedback.

Phase	**3.0 Engagement Execution for a PE CS Engagement**
Sub-Phase	**3.6 Engagement Report/Presentation Generation**
Step	**3.6.3 Draft PowerPoint Presentation**
Notes	1. Engagement report/presentation generation can be offered as a stand-alone service provided by the CS Team. Additionally, the CS engagement may not include the engagement report/presentation generation sub-phase. The scope of the CS engagement should be captured in the Project Charter.
Prerequisite Step	3.6.2 Conduct engagement report review process
Step Actions	1. Using the Final Engagement Report, draft a PowerPoint presentation 1.1. Include key information from the report 1.2. Design the PowerPoint for its intended audience 1.2.1. It may be necessary to develop multiple PowerPoints for multiple audiences 2. Review the PowerPoint with the internal CS Team 3. Update the PowerPoint per internal CS Team feedback 4. Submit the PowerPoint to the CS Program Manager for feedback 5. Update the PowerPoint per CS Program Manager feedback 6. Upload the PowerPoint to the PE PowerPoint site
Duration	~ 1 month

Deliverable	1. Engagement PowerPoint
Sample(s)	BCMA National PE CS Survey Presentation
Follow-up Step	3.6.4 Share engagement results with stakeholders

Phase **Sub-Phase** **Step**	**3.0 Engagement Execution for a PE CS Engagement** **3.6 Engagement Report/Presentation Generation** **3.6.4 Share Engagement Results with Stakeholders**
Notes	1. Engagement report/presentation generation can be offered as a stand-alone service provided by the CS Team. Additionally, the CS engagement may not include the engagement report/presentation generation sub-phase. The scope of the CS engagement should be captured in the Project Charter.
Prerequisite Step	3.6.2 Conduct engagement report review process
Step Actions	1. Work with the Steering Committee to determine stakeholder groups that will receive a presentation of the Engagement PowerPoint 1.1. Stakeholder Groups may include the following: 1.1.1. User Working Group 1.1.2. Groups that helped market the survey 1.1.3. Survey respondents 1.1.4. Groups responsible for managing aspects of the IT product/service assessed 1.1.5. Program offices affected by the IT product/service assessed or affected by results of the CS engagement 2. Schedule presentation dates and times with identified stakeholders 3. Present the Engagement Presentation to identified stakeholders
Duration	~ 1 month
Deliverable	
Sample(s)	See sample for Step 3.6.3
Follow-up Step	4.1.1 Update the Concept of Operations
Tips for Success	Attempt to present the Engagement PowerPoint during existing monthly meetings.

Phase	**4.0 Lessons Learned for PE CS Engagement**
Sub-Phase	**4.1 Internal Lessons Learned**
Step	**4.1.1 Update the Concept of Operations**
Prerequisite Step	4.1.2 Share engagement results with stakeholders
Step Actions	1. Review the most recent Concept of Operations (CONOPS) with the internal CS Team 2. Update any program information that has changed or been added since the CONOPS was last updated 3. Review the updated CONOPS with the internal CS Team for their feedback 4. Update the CONOPS per CS Team feedback 5. Submit the CONOPS to the CS Program Manager 6. Update the CONOPs per CS Program Manager feedback 7. Upload the CONOPS to the PE SharePoint site
Duration	~ 1 week
Deliverable	1. Concept of Operations
Template	
Follow-up Step	4.1.2 Update the Process & Procedures
Tips for Success	

Phase	**4.0 Lessons Learned for PE CS Engagement**
Sub-Phase	**4.1 Internal Lessons Learned**
Step	**4.1.2 Update the Process & Procedures**
Prerequisite Step	4.1.1 Update the Concept of Operations
Step Actions	1. Review the most recent Process & Procedures with the internal CS Team 2. Update any program information that has changed or been added since the Process & Procedures was last updated 3. Review the updated Process & Procedures with the internal CS Team for their feedback 4. Update the Process & Procedures per CS Team feedback 5. Submit the Process & Procedures to the CS Program Manager 6. Update the Process & Procedures per CS Program Manager feedback 7. Upload the Process & Procedures to the PE SharePoint site
Duration	~ 1 week
Deliverable	1. Process & Procedures
Template	
Follow-up	4.1.3 Update the Roles & Responsibilities Matrix

Step	
Tips for Success	

Phase **Sub-Phase** **Step**	**4.0 Lessons Learned for PE CS Engagement** **4.1 Internal Lessons Learned** **4.1.3 Update the Roles & Responsibilities Matrix**
Prerequisite Step	4.1.2 Update the Process & Procedures
Step Actions	1. Review the most recent Roles & Responsibilities Matrix with the internal CS Team 2. Update any program information that has changed or been added since the Roles & Responsibilities Matrix was last updated 3. Review the updated Roles & Responsibilities Matrix with the internal CS Team for their feedback 4. Update the Roles & Responsibilities Matrix per CS Team feedback 5. Submit the Roles & Responsibilities Matrix to the CS Program Manager 6. Update the Roles & Responsibilities Matrix per CS Program Manager feedback 7. Upload the Roles & Responsibilities Matrix to the PE SharePoint site
Duration	~ 1 week
Deliverable	1. Roles & Responsibilities Matrix
Template	
Follow-up Step	4.2.1 Conduct lessons learned retrospective
Tips for Success	

Phase **Sub-Phase** **Step**	**4.0 Lessons Learned for PE CS Engagement** **4.2 PE Lessons Learned** **4.2.1 Conduct Lessons Learned Retrospective**
Prerequisite Step	4.1.3 Update the Roles & Responsibilities Matrix
Step Actions	1. Work with the PE Lessons Learned domain to schedule a Lessons Learned Retrospective about the CS engagement 2. Hold the Lessons Learned Retrospective 3. Follow-up with the PE Lessons Learned domain as necessary
Duration	~ 1 week

Deliverable	1.
Template	
Follow-up Step	N/A
Tips for Success	The retrospective should be held shortly after the CS engagement concludes. This allows CS Team members to remember all aspects of the CS engagement and provide valuable feedback for program improvement.