**CUSTOMER FEEDBACK**

1. **SCOPE**

This Quality Work Instruction (QWI) defines the Enterprise Project Management Office (EPMO) process to

effectively solicit, collect, analyze and manage Customer Feedback regarding the effectiveness of the EPMO

Quality Management System (QMS).

1. **OWNER**
   1. The Enterprise Project Management Office (EPMO) Director owns this QWI. No changes, additions or alterations may be made without the owner’s written approval.
2. **REFERENCE DOCUMENTS**

|  |  |
| --- | --- |
| **DOCUMENT IDENTIFICATION** | **DOCUMENT TITLE** |
| [EPMO RECORDS PER CHAPTER 121 & 132](http://stateschedules.ncdcr.gov/Schedules/Office%20of%20the%20Governor/Office%20of%20Information%20Technology%20Services/Enterprise%20Technology%20Project%20Management%20Office/GovOff_EnterpriseTechProjMgn.pdf) | [PROGRAM RECORDS RETENTION & DISPOSTION SCHEDULE](http://www.stateschedules.ncdcr.gov/Scheds.aspx?L1=Department%20of%20Information%20Technology&L2=Enterprise%20Project%20Management%20Office&L3=&L4=&L5=&lev=Level2&F=Level1,Level2,Level3,Level4,Level5,Title,Description&T=project%20management&AO=OR) |
| 0100-0800-010-B | **FORMS AND RECORDS CONTROL** |
| 0300-0300-005-B | [PROJECT MANAGEMENT PROCESS](https://it.nc.gov/document/project-management-process) |
| 0600-0600-005-B | **CORRECTIVE ACTION PROCESS** |
| 0700-0700-005-B | **PREVENTIVE ACTION PROCESS** |
| 0300-0350-005-C | [PROJECT CLOSEOUT](https://it.nc.gov/document/project-closeout) |

1. **ASSOCIATED FORMS**

|  |  |
| --- | --- |
| **FORMS IDENTIFICATION** | **FORM TITLE** |
| 0300-0395-005-D | [CUSTOMER FEEDBACK FORM](https://it.nc.gov/document/customer-feedback-form) |

1. **DEFINITIONS**

* **CUSTOMER:** ***Link to Glossary of Terms and Definitions***

1. **PROCEDURE**

**NOTE:** *The Customer Feedback Form is completed as a SharePoint list in the Touchdown System, but these forms can be used by Project Managers as a template. In the Touchdown System, it is called the Customer Satisfaction Survey.*

* 1. **Solicit Customer Feedback.**

Solicitation of Customer Feedback is a critical proactive step in assessing Quality Management System (QMS) effectiveness and continual improvement. The EPMO shall solicit Customer Feedback for projects within sixty (60) days of Project Closeout per [0300-0350-005-C PROJECT CLOSEOUT](https://it.nc.gov/document/project-closeout). However, Customer Feedback may be solicited at any time.

* 1. **Collect Customer Feedback.**

Customer Feedback is essential in determining customer satisfaction and enabling continual process improvement. Customer Feedback may be formal or informal, and may be received from numerous

sources in various formats. Examples include face-to-face, telephone, email or electronic surveys. Customer Feedback falls into two basic categories: “Unsolicited” or “Solicited”; and, may be further characterized as “Positive”, “Negative” or “Neutral”.

* 1. **Submit Customer Feedback.**

Customer Feedback may be submitted at any time. “Unsolicited” Customer Feedback may be submitted using the [0300-0395-005-D CUSTOMER FEEDBACK FORM](https://it.nc.gov/document/customer-feedback-form). “Solicited” Customer Feedback shall be submitted using the [0300-0395-005-D CUSTOMER FEEDBACK FORM](https://it.nc.gov/document/customer-feedback-form) or electronic survey. When the [0300-0395-005-D CUSTOMER FEEDBACK FORM](https://it.nc.gov/document/customer-feedback-form) is used, the feedback provider, solicitor or recorder will:

* + 1. Complete the Project Information section of the Customer Feedback Form. (Section 1.0)
    2. Complete the Customer Feedback section of the Customer Feedback Form. (Section 2.0)
       1. Customer Feedback responses are collected using a 5-point rating scale (see below). Comments relative to each Customer Feedback item are encouraged. (Sections 2.1-2.6)
          - “N/A” (“Not Applicable” may be used for “Unsolicited” Customer Feedback)
          - “5 - Excellent”
          - “4 - Above Average”
          - “3 - Average”
          - “2 - Below Average”
          - “1 - Poor”
       2. Provide additional comments or feedback as appropriate. Alternatively, may be used to “copy/paste” or summarize “Unsolicited” Customer Feedback. (Section 2.7)

(**Note:** A completed [0300-0395-005-D CUSTOMER FEEDBACK FORM](https://it.nc.gov/document/customer-feedback-form) containing any rating score below “3 - Average” on the five point rating scale will be characterized as “Negative”.)

* 1. **Analyze Customer Feedback.**

Upon receipt of Customer Feedback, the designated Project Management Advisor (PMA) for monitoring and tracking Customer Feedback will collect the completed form and process the results. The PMA will analyze the information provided on the [0300-0395-005-D CUSTOMER FEEDBACK FORM](https://it.nc.gov/document/customer-feedback-form), characterize the feedback as “Positive”, “Negative” or “Neutral”, and determine if additional action is required.

* 1. **Manage Customer Feedback.**

Customer Feedback may or may not require additional action. In cases where additional action is required, the PMA will manage the development and implementation of a response in accordance with established QMS procedures and provide visibility to senior management.

* + 1. For Customer Feedback characterized as “Negative” the PMA will initiate Corrective Action in accordance with **0600-0600-005-B CORRECTIVE ACTION PROCESS** or Preventive Action in accordance with **0700-0700-005-B PREVENTIVE ACTION PROCESS** as appropriate.
    2. For Customer Feedback characterized as “Positive” or “Neutral” the PMA may initiate Preventive Action in accordance with **0700-0700-005-B PREVENTIVE ACTION PROCESS** as necessary.
  1. **Record Customer Feedback.**

The designated PMA will post the completed [0300-0395-005-D CUSTOMER FEEDBACK FORM](https://it.nc.gov/document/customer-feedback-form) and other Customer Feedback documents in the EPMO Project Management document repository.

1. **RECORDS**
   1. Unless otherwise specified in this Procedure/QWI, Records shall be maintained in accordance with **0100-0800-010-B FORMS AND RECORDS CONTROL** procedure.
2. **REASON FOR CHANGE**
   1. Initial issue.
   2. Update EPMO Manager to EPMO Director.
   3. Added note that this information is a SharePoint list in the Touchdown System.