

# NEW! Client Satisfaction Survey Process



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# Overview

- NSM is migrating to a new customer satisfaction survey process that will survey clients throughout order process after the following activities are completed: evaluation, funding and delivery.
- New process helps ensure we provide a quality experience from evaluation through delivery.
- Client survey requests will be sent via text message
- Each survey asks no more than six questions
- Each survey take less than one minute to complete encouraging participation
- For almost one year, we have been using this new pulse survey process with our Kaiser Permanente clients and completion rates are consistently 11-14%.\*
- We will activate the new survey process for new equipment orders (except Kaiser) and once rolled out for all U.S. locations will add repairs, home access and supplies orders.

New survey process expected to quadruple our survey completions rates\*!

\*Current completion rates are 3%



# NEW! Client Satisfaction Survey Benefits

- Survey requests sent via text message presenting a better opportunity for engagement.
- Surveys are no more than six questions to encourage participation.
- Automatic request to leave a google review will be presented to clients that completed the survey and are highly satisfied.
- Survey results reported within 24 hours of completion.
- Access to a real-time Power BI report to view results by branch, region and division along with many other views by work order and individual surveys.
- Notify the appropriate NSM leader when a survey score is below expectation to allow for investigation and opportunity to resolve.

This approach provides NSM a more dynamic approach to client satisfaction allowing for more customer insights throughout the order process.



# How it Works

1. Surveys are sent THREE times throughout the new equipment order process (Home Access, Cash Pay, and Supplies orders will be added in Q4 2025.)

Pulse Survey Name	Mobility Advisor Data Required to Send Survey	Text Request Sent to Client
Evaluation	Actual Evaluation Date	Within 24 Hours after data is entered into Mobility Advisor
Funding	Funding Approved Date	
Delivery	Actual Delivery Date	

2. The following automated text message is sent to qualifying clients

*Please rate your recent experience with National Seating & Mobility. Click link to begin. [insert link] Reply STOP to opt out.*

3. A HIPAA secure link is provided within the text message for client to and take survey.
4. Survey results are recorded in the corresponding work order notes and in the Power BI report located within the Branch Operations Dashboard.



# Survey Rating Scale & Questions



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# Survey Rating Scale

**Rating scale for all survey questions, unless otherwise noted in each survey.**

5 - Strongly Agree

4 - Agree

3 - Neutral

2 - Disagree

1 - Strongly Disagree



# Survey #1: Evaluation

1. The Assistive Technology Professional (ATP) who completed my evaluation
  - a. was friendly and professional
  - b. clearly communicated the equipment order timeline
  - c. clearly explained the equipment order process
  - d. took the time to answer my questions
2. Please leave any additional comments below. *(optional)*

*Survey 5-point rating scale used for question 1A-D*

*1- Strongly Disagree, 2- Disagree, 3 - Neutral, 4 - Agree, 5 - Strongly Agree*

Mobility Advisor Trigger to send to qualifying clients: Actual Evaluation Date.



# Survey #2: Funding

1. During the process of preparing and submitting your order for insurance approval
  - a. You were informed of your estimated financial responsibility and/or co-insurance amount that is due on or before receipt of order
  - b. Informed of any delays in securing documentation and/or authorization
  - c. Able to get answers to any funding related questions
2. Please leave any additional comments below. (optional)

*Survey 5-point rating scale used for question 1A-C*

*1- Strongly Disagree, 2- Disagree, 3 - Neutral, 4 - Agree, 5 - Strongly Agree*

Mobility Advisor Trigger to send to qualifying clients: Actual Funding Approval Date.



# Survey #3: Delivery

1. The person who delivered my equipment
  - a. was friendly and professional
  - b. provided and reviewed the equipment manual with me
  - c. answered all my questions
2. Does the equipment we recently delivered meet your needs?  
*Meets The Joint Commission Requirement to replace client phone calls*
  - a. Yes or No
  - b. If no, request client provide additional details
3. When thinking about your overall order experience with National Seating & Mobility, how likely are you to recommend them to family or friends?
  1. *Very Likely, Somewhat Likely, Neutral, Somewhat Unlikely, Very Unlikely*
4. Please leave any additional comments below. (optional)

*Survey 5-point rating scale used for question 1A-C*

*1- Strongly Disagree, 2- Disagree, 3 - Neutral, 4 - Agree, 5 - Strongly Agree*

Mobility Advisor Trigger to send to qualifying clients: Actual Delivery Date.



# Survey Scoring, Follow-Up Procedures and Reporting



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# Survey Scores & Client Completion Messages

Survey scores are tabulated by adding up the scores for each question and dividing by the number of questions in the survey to get survey score. The survey score will dictate the message that is sent to the client after the survey is completed.

Survey Score	Message to Client Post Survey Submission
5	<p><i>We are happy you had a good experience with National Seating &amp; Mobility! To help others discover us, would you please leave a Google Review? Click <a href="#">here</a>* to get started.</i></p>
4	<p><i>*The Google review link will correspond with the appropriate branch location's Google Business Profile to make it easy for client to leave a review.</i></p>
3	<p>Thank you for your feedback. We review all survey feedback to help us learn and improve as we strive to provide an excellent experience every time. Someone may be reaching out to learn more about your experience.</p>
2	
1	

**4 or better score is goal for all completed surveys!**

**Please note:** For the Delivery survey, if the survey result is 4 or better and a yes to question 2, the client will receive the 'we are happy' message above. If the result is 3 or less and a yes or no to question 2, the client will receive the 'thank you for your feedback' message above.



# Low Survey Score Follow-Up Procedures

**If any survey receives a score of 2 or below**, the corresponding branch leader or funding supervisor will receive an email notification and will need to investigate.

- **Branch Leaders (cc RAD)** receive notifications for all qualifying evaluation and delivery surveys.
- **Funding Supervisors (cc Funding Director)** receive notifications for all qualifying funding surveys.

*To: Branch Leader or Funding Supervisor*

*CC: RAD or Funding Director*

*Email Subject: Client Survey Results Notification*

*A [evaluation/funding/delivery] survey was completed for work order [work order #] and the results were below expectation. Please investigate by following these steps.*

***Step 1: Review work order notes to learn cause(s) for client's dissatisfaction.***

***Step 2: Contact the NSM Employee(s) that served client to learn more about the situation.***

***Step 3: Contact the client, if appropriate, to learn more and determine if there is anything that can be done to help improve the client's overall impression of NSM.***

***Step 4: Document details of investigation in the work order notes in Mobility Advisor.***

*Thank you in advance for taking this matter seriously. Providing the best client experience is always what we strive for at NSM.*



# Survey Score Tracking & Reporting

- All survey results will be tracked by work order.
- The results will be stored in the work order notes and reported in a the Power BI report that will be available in the Branch Operations dashboard.
- If multiple surveys are completed for a work order, the individual results will be recorded along with an overall combined score.
- All survey results will be updated daily.



# Survey Activation Schedule

<b>DATE</b>	<b>Launch Details</b>
July 21	Test Survey Functionality, Collection and Reporting
August 4	Launch pilot in NorCal
September 1	Rollout across U.S. Locations
October 15	Expand Process for Repair Orders
December 1	Expand Process for Home Access & Supplies Orders

