

# Upshot Customer Satisfaction Survey 2017



# Introduction

The following presentation shows responses from the 2017 Customer Satisfaction Survey that was sent via email on the 8<sup>th</sup> June 2017.

The survey was sent to 1,542 people with a deadline date of 9<sup>th</sup> July 2017.

Of the 1,542 surveys that were sent out, we received 321 anonymous responses (21%).

The Customer Satisfaction Survey allows us to collect and analyse data from anyone who uses Upshot whether that be funding agreements or own purchases.

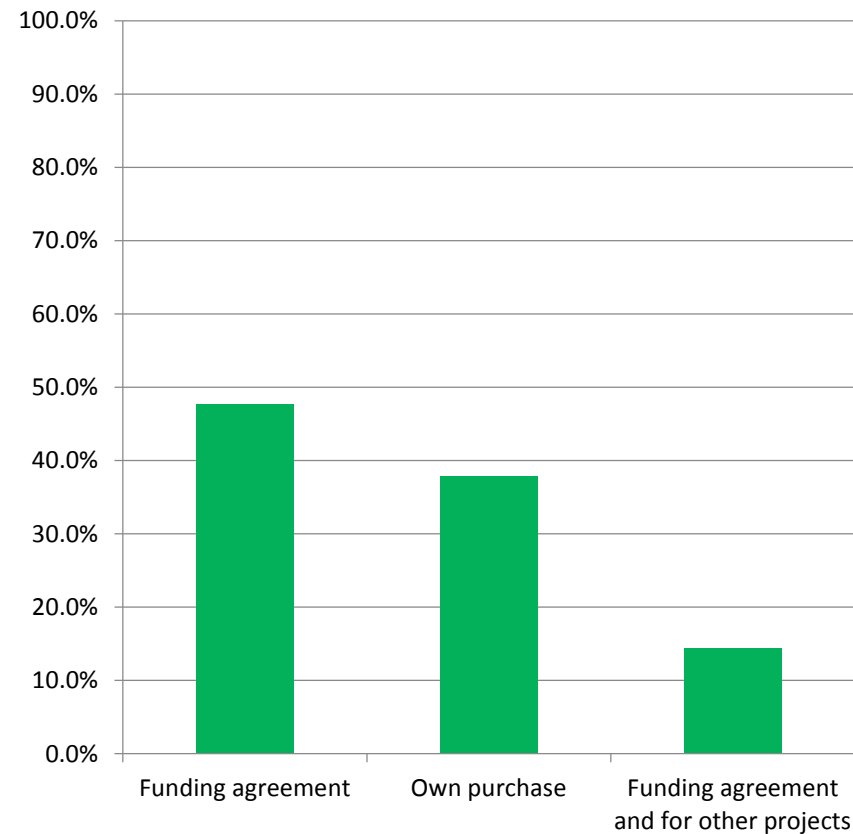
This helps us understand how different customers view the product and services by giving valuable feedback.

From the data that has been collected, not only are we able to analyse the positive feedback but also the areas that our clients identify as problems. We are then able to find solutions for these quickly and efficiently.

# Executive Summary

- 48% of respondents use Upshot as part of a funding agreement, 38% purchased Upshot for their own organisation, 14% have used Upshot as part of a funding agreement and for other projects.
- 89% of respondents either agree or strongly agree that Upshot is 'user-'friendly'.
- 98.4% of respondents rated our customer service as positive or very positive.
- 85% of respondents agreed that the training they received from Upshot staff left them well equipped and confident when using the system.
- 94% of respondents found the help guides and videos useful or very useful after using them.
- 94% of respondents either agree or strongly agree that Upshot helps them in their role.
- 91% of respondents find it easier to show the impact of their work with Upshot.
- 77.8% of respondents believe that by using Upshot, their organisation is in a better position to apply for funding.
- 84% either agree or strongly agree that Upshot has made project management easier for their organisation.
- 92.9% of respondents either agree or strongly agree that Upshot has made monitoring and evaluation easier for their organisation.
- Approximately 2/3 of respondents have noticed that Upshot has improved or developed since first using the system.
- 86% of respondents believe that Upshot is a better monitoring system than others they have used.
- 90% of respondents would recommend Upshot to other organisations.

## Do you use Upshot as part of a funding agreement or did you purchase Upshot for your organisation?



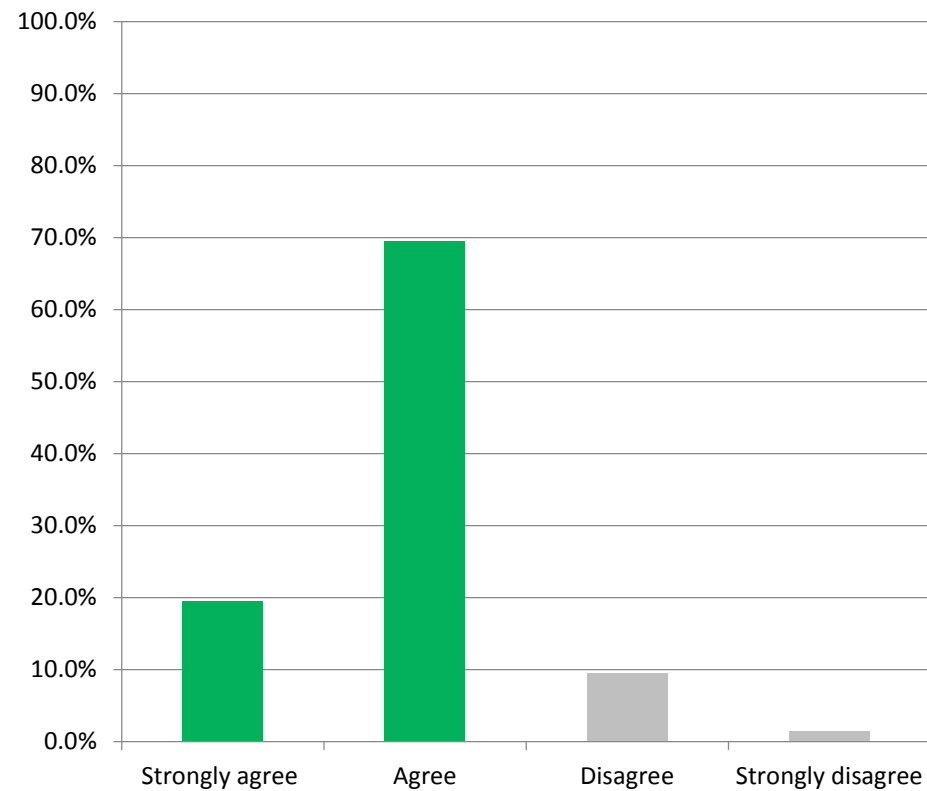
‘Funding Agreement’ –originally purchased by a parent/funding organisation and has been mandated to sub organisations.

‘Own Purchase’ – One organisation has purchased Upshot for own use.

‘Funding Agreement & Other Projects’ – Organisation initially mandated to use Upshot and then upgraded for own use.

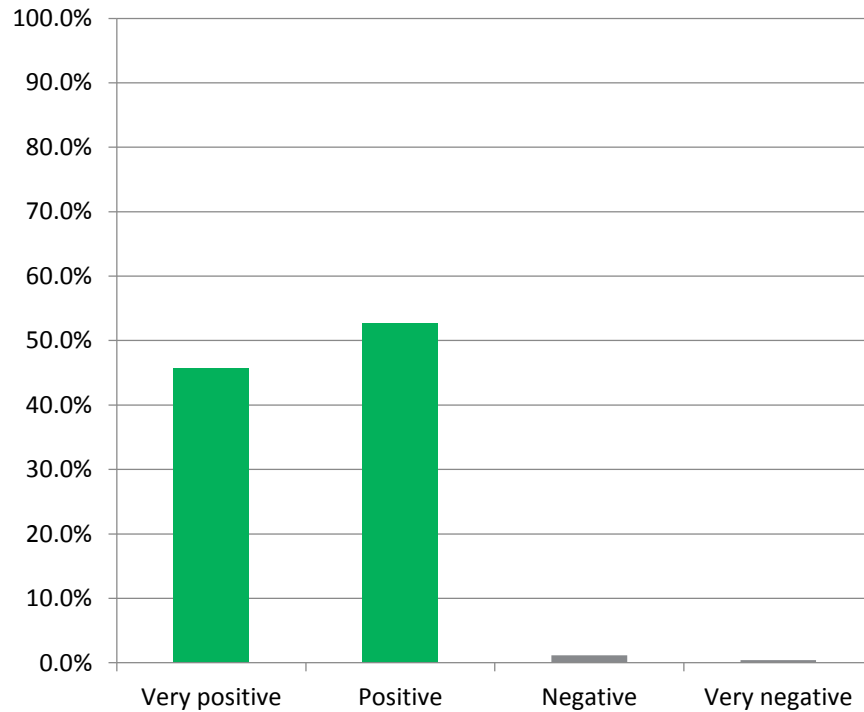
- 48% of respondents use Upshot as part of a funding agreement.
- 38% purchased Upshot for their own organisation.
- 14% have used Upshot as part of a funding agreement and for other projects.

“I find Upshot user-friendly” – To what extent do you agree with this statement?



- 89% of respondents either agree or strongly agree that Upshot is ‘user-friendly’.
- 8.8% increase from 2016 results (80.2%)

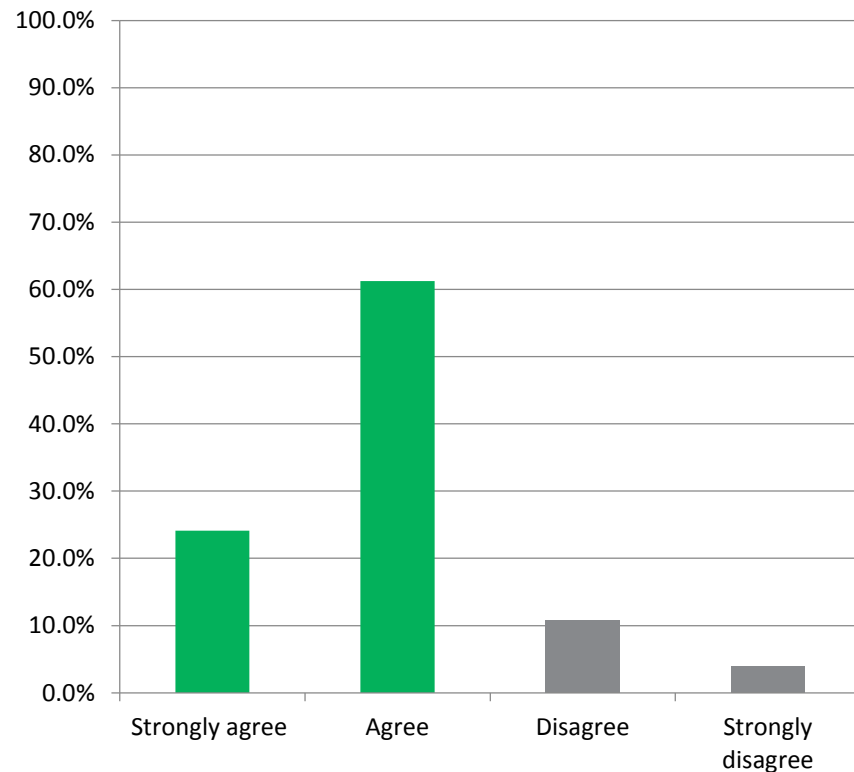
## How would you rate our customer support?



- 98.4% of respondents rated our customer service as positive or very positive.
- This means that only 5 organisations of the 321 that responded rated our customer support as negative or very negative.
- These results show a 4.6% increase from 2016.

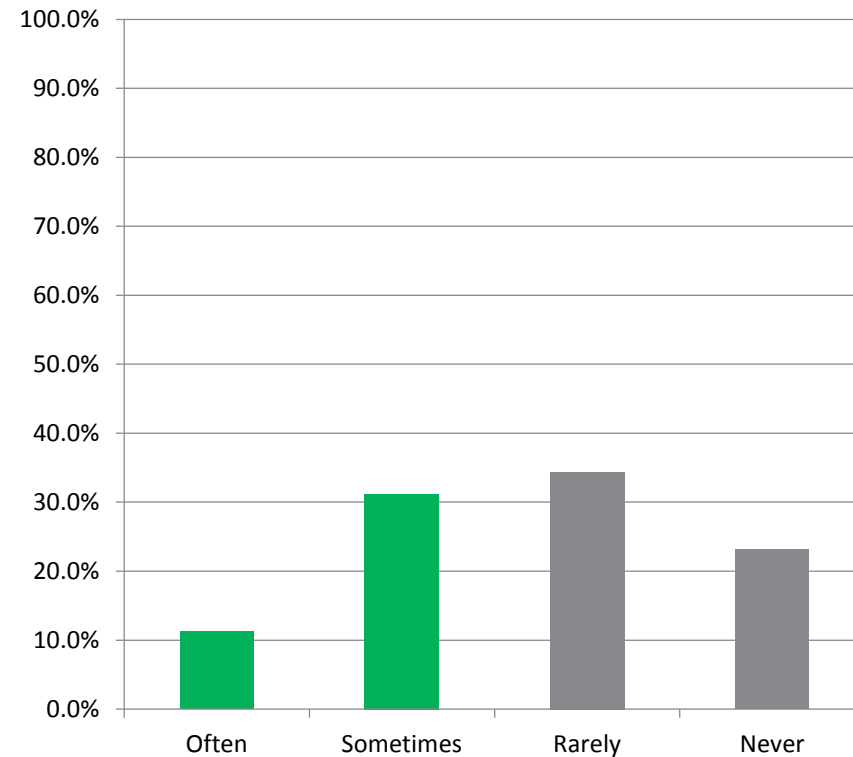
# SUPPORT

“The training I received from Upshot staff left me well-equipped and confident when using the system” – To what extent do you agree with this statement?



- 85% of respondents agreed that the training they received from Upshot staff left them well equipped and confident when using the system.
- This is a decrease of almost 5% from the 2016 results, however doesn't tie in to other results that were found (question before).

## How regularly do you use the Upshot help guides within the system?



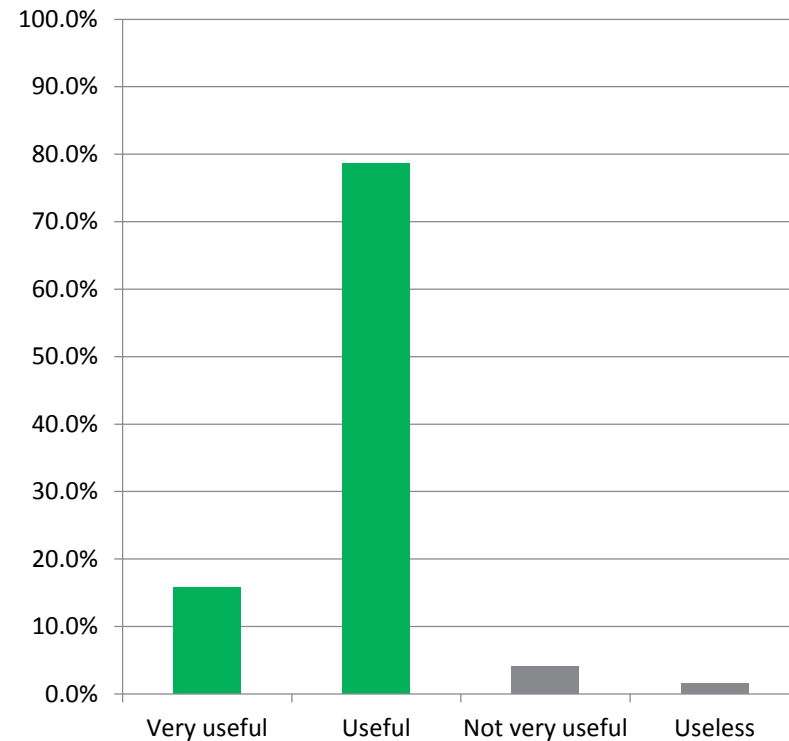
23% of respondents stated that they never use the Upshot help guides. This could mean a number of things including:

1. The system is relatively self explanatory and simple to use.
2. Users feel that the help guides don't actually help.
3. Users don't know there are help guides for the system.

On the other hand, 11% often use the help guides which suggests that the system could be simpler to use to enable those who are less familiar with Upshot to use the product more efficiently.



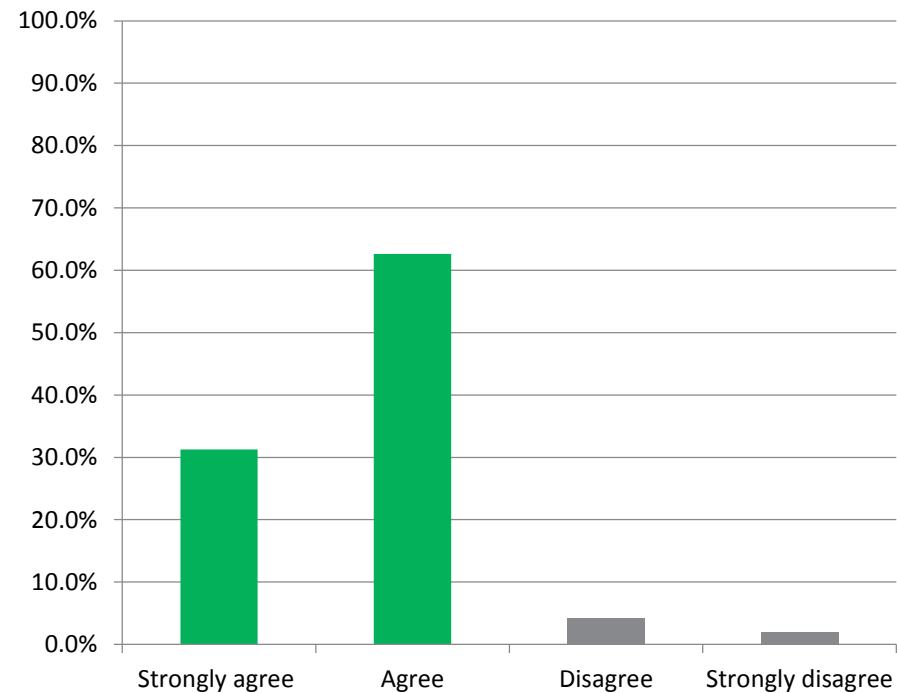
If you have used the help guides or videos, how useful did you find them?



- 94% of respondents found the help guides and videos useful or very useful after using them.
- This links with the question before, suggesting that even though some organisations may use the help guides 'often', they find them informative and helpful.

## UPSHOT IN MY ROLE

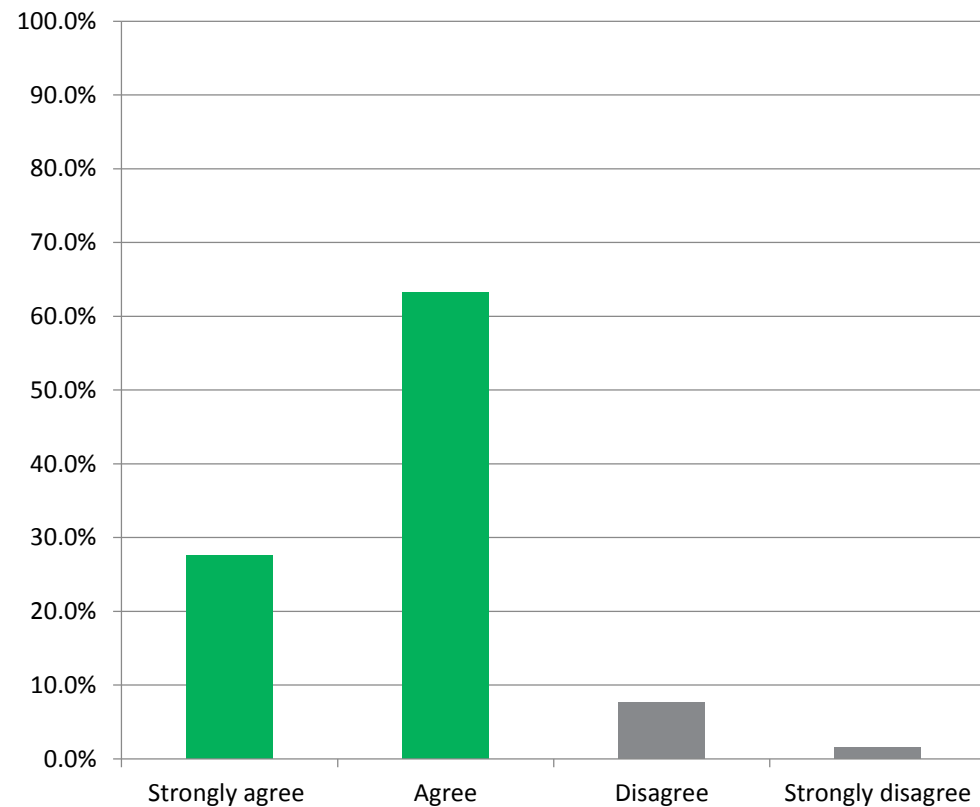
“Upshot helps me in my role” – To what extent do you agree with this statement?



- 94% of respondents either agree or strongly agree that Upshot helps them in their role.
- The 2017 results show a 3% increase from the previous year.

## UPSHOT IN MY ROLE

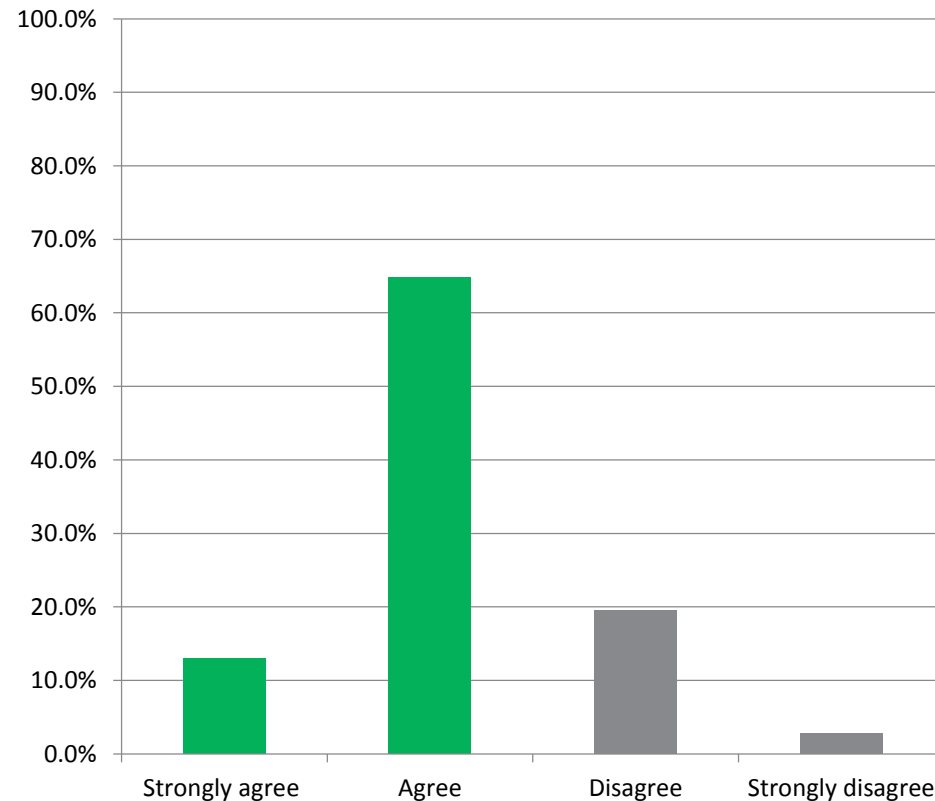
“Upshot has made it easier for me to show the impact of my work” – To what extent do you agree with this statement?



- 91% of respondents find it easier to show the impact of their work with Upshot.
- This is a 3.6% increase from the 2016 results. This shows that organisations are finding it easier to show the impact of their work through Upshot and are likely to continue to use it.

## UPSHOT IN MY ROLE

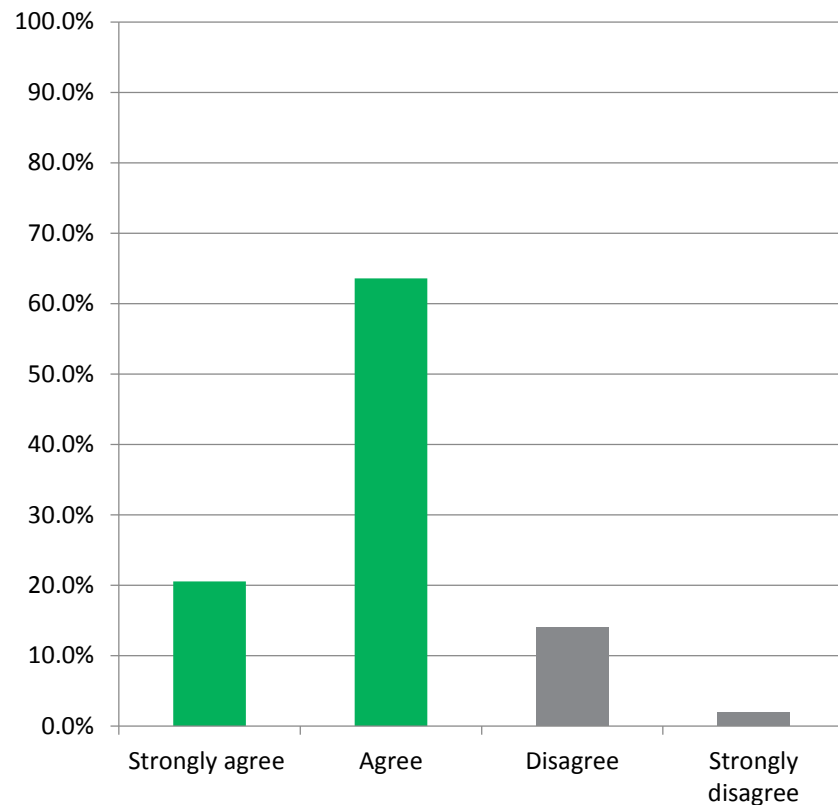
“Upshot has made it easier for my organisation to apply for funding” –  
To what extent do you agree with this statement?



- 77.8% of respondents believe that by using Upshot, their organisation is in a better position to apply for funding.
- Increase of 3.5% from 2016. Links with the previous slide in the fact that being able to prove that your work is making a difference, is likely to help with applying for funding.
- A number of clients that use Upshot are organisations that provide funding, therefore this question does not apply to them.

## UPSHOT IN MY ROLE

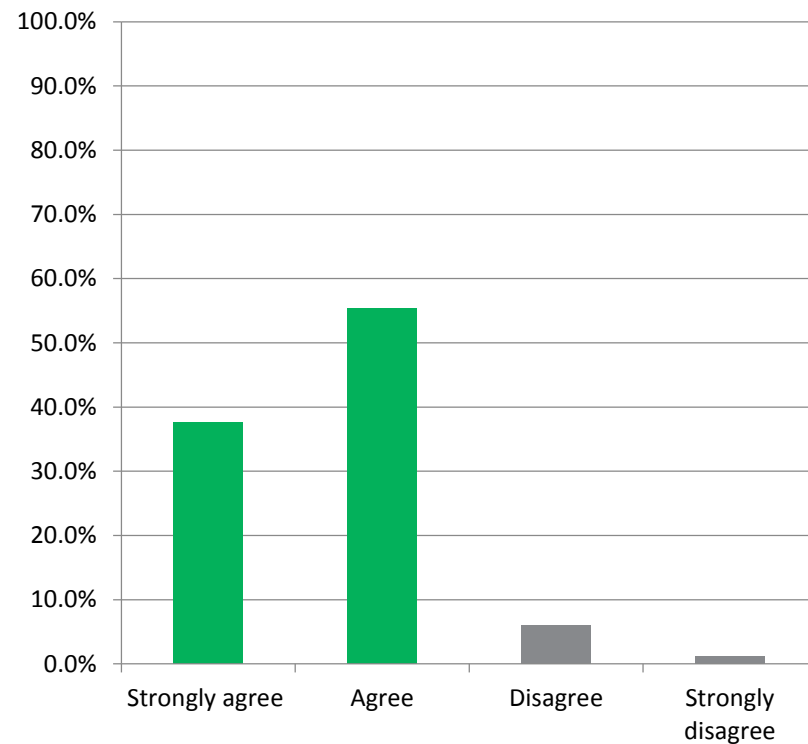
“Upshot has made project management easier for my organisation” – To what extent do you agree with this statement?



- 84% either agree or strongly agree that Upshot has made project management easier for their organisation.
- Slight increase of 1% from 2016 results.

## UPSHOT IN MY ROLE

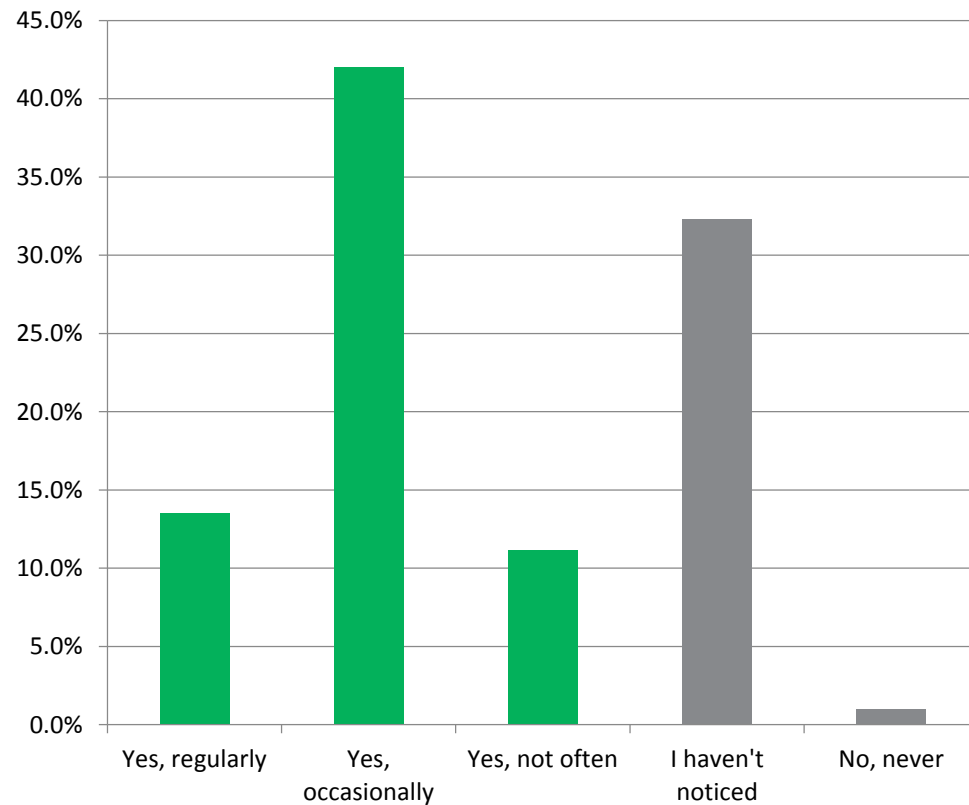
“Upshot has made monitoring and evaluation easier for my organisation” – To what extent do you agree with this statement?



- 92.9% of respondents either agree or strongly agree that Upshot has made monitoring and evaluation easier for their organisation.
- These figures are similar to the figures from 2016 (92.7%).

# THE SYSTEM

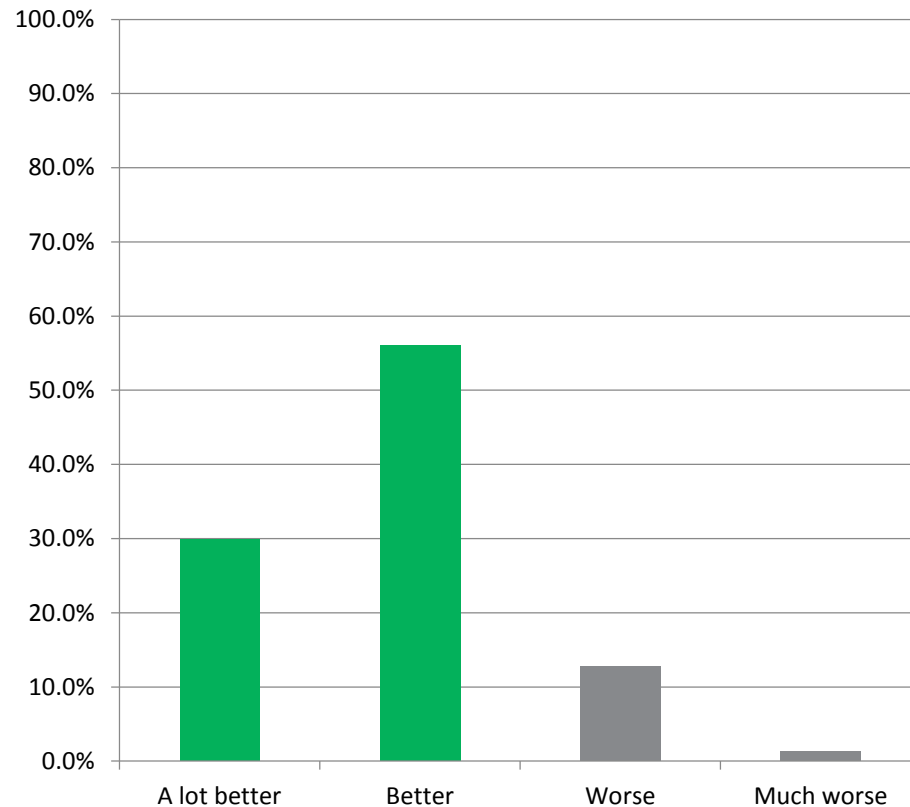
## Have you noticed that Upshot is improving and developing?



- Approximately 2/3 of respondents have noticed that Upshot has improved or developed since first using the system.
- A way of making clients aware of regular changes to the system could be to send out a newsletter monthly or every time a major improvement has happened.

# THE SYSTEM

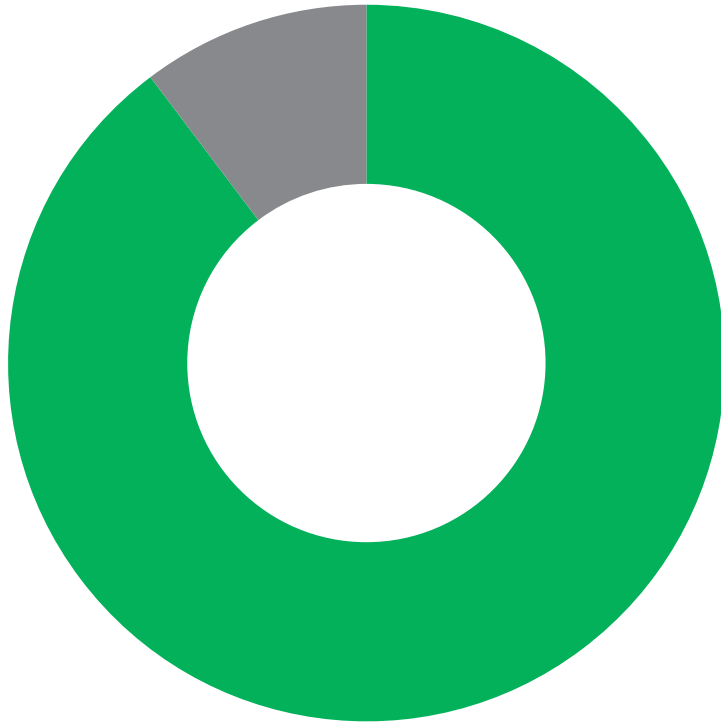
If you have used other monitoring systems before, please tell us how Upshot compares?



- 86% of respondents believe that Upshot is a better monitoring system than others they have used.
- This suggests that Upshot has an advantage over its rivals. This could be because Upshot is easy to use, the customer support is better, its better value for money or any other factor.



## Would you recommend Upshot to other organisations?



- 90% of respondents would recommend Upshot to other organisations
- 0.9% increase from 2016 results (89.1%)

“Having most things in the one place and being able to enter data directly, thus cutting out some paperwork.”

“Upshot has proved extremely useful with ensuring all M&E is recorded effectively for specific programmes where required.”

“Great record keeping, especially when I can keep track of what information I am missing.”

“The continuous building of case studies within the system helps to justify funding and help with future bids.”

“Tracking performance against KPI's is very easy with the visual layout.”

“It is easy to keep track of progress towards targets.”

## What is/are the most useful thing(s) about using Upshot?

“Great support from the Upshot Team - very knowledgeable, helpful staff. They are really responsive and go the extra mile to help and provide great customer service. Very friendly too!”

“Upshot allows us to keep everything in once place, it has helped us in so many ways and we are grateful to have this system in place.”

“Being able to look at how students are developing and what employable skills they have learned.”

“The ability of the system to identify connections between individuals and elements of the programme not previously recognised.”

“It would be great to see this as an app like other sporting apps out there.”



“Absolutely fantastic, makes reporting easy and looks presentable. Can transfer data in graphs to make stats look more presentable.”

“Upshot helps me organise collate and collect information in a easy, quick and efficient manner.”

“I have colleagues that use Upshot for their work and I can see the huge benefits to them.”

## Any other comments?

“Please keep improving the way you have been, and we are thankful for your continued support and help.”

“Just that Tobi has been a pleasure to work with and has been very supportive throughout - thanks!”

“I would definitely recommend Upshot to other organisations/colleagues as it is an excellent tool which enables us to monitor the progress and success of our project.”

“I have colleagues that use Upshot for their work and I can see the huge benefits to them.”

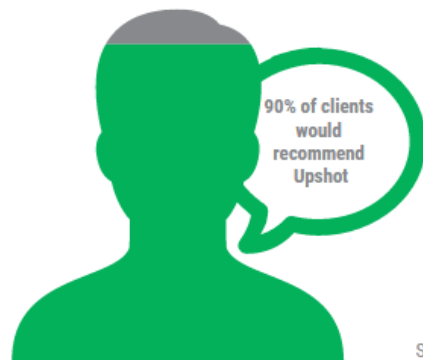
“It is a fairly simple piece of software to use in comparison to others and it has very useful tools.”

# Conclusion

- Overall, the majority of the results collected in 2017 show a positive increase compared to 2016.
- User-friendliness has the highest increase (8.8%)
- Customer support is the stand out result with over 98% seeing it as positive. This proves that our knowledge of the product and problem solving skills have increased.
- When one-to-one support has not been available, customers are able to use the help guides and videos to solve their problems easily.
- Upshot clearly helps people (96%) in whatever role they have in an organisation whether that be through M&E, showing impact or project management.
- Over 90% of respondents would recommend Upshot to other organisations.

# Customer Satisfaction Survey 2017

**UPSHOT**  
MANAGE | MONITOR | EVIDENCE



98.4% rated our customer support as positive or very positive



Survey



1,542 surveys  
321 respondents  
21% response rate

89% believe Upshot is user-friendly



86% believe Upshot is a better monitoring system than others that have been used



## Customer support

**UPSHOT**  
MANAGE | MONITOR | EVIDENCE

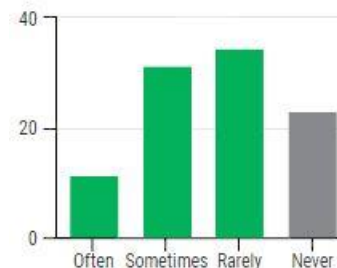
85%



Training

More than 270 people found our training left them confident and well equipped to use Upshot

How regularly do you use our help guides?



Approximately 3/4 of respondents use our help guides on the system

How useful were the help guides?



94% of respondents found the help guides useful

How do people view our customer support?



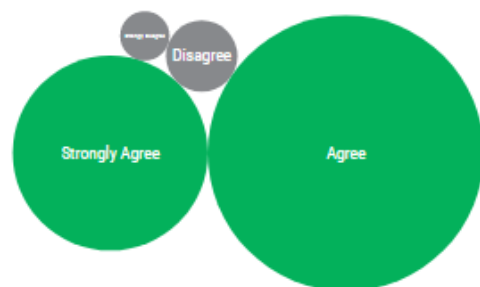
Over 98% of respondents stated our customer support was either positive or very positive

Two thirds of clients notice Upshot is continually improving and developing

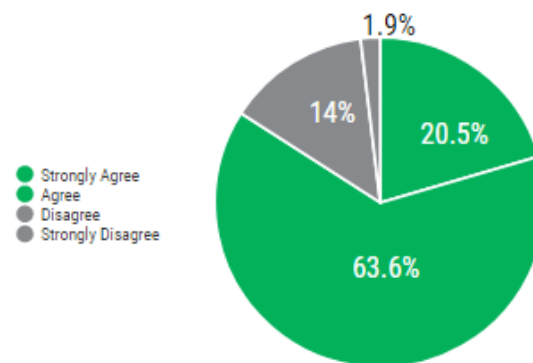


# Using Upshot in my role

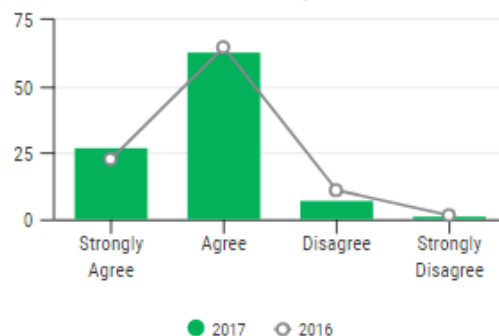
"Upshot helps me in my role"



"Upshot has made project management easier for my organisation"



"Upshot helps me to show impact"

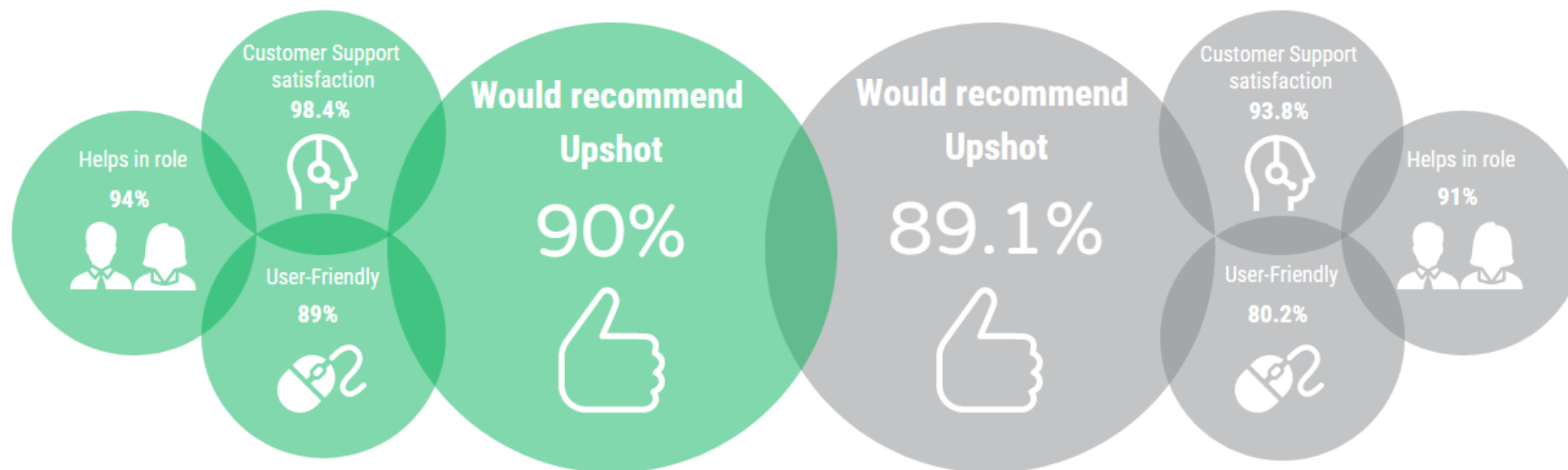


## M&E



93% believe using Upshot has made monitoring and evaluating data easier

# 2017 Vs 2016



	+/- Difference
Recommendation	+0.9%
Customer support satisfaction	+4.6%
User-friendly	+8.8%
Helps in role	+3%

## Key words and phrases from Qualitative Data

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User-Friendly  
Monitoring & Evaluation  
Sharing Details Running Reports Planning  
Intuitive Data Collection Uploading Media  
Mapping Customer Support  
Clear & Concise Quick & Easy Statistics  
Accurate Tracking Attendance Capacity Flexibility  
Registrations Showing Impact  
Gather Evidence



# Appendix

The results in this presentation have been taken from a percentage of responses that answered either 'strongly agreed', 'agreed', 'disagreed' or 'strongly disagreed'.

In the initial survey, we also gave the options of 'neither agree nor disagree' and 'not-applicable'. For presentation purposes these have been removed but raw data breakdown is available upon request.

The one exception to this is the question regarding funding. We decided to include results from 'neither agree or disagree' and 'N/A' because some responses are likely to be funding organisations and so applying for funding does not apply to them.



MANAGE | MONITOR | EVIDENCE

Want to find out more about our Customer Satisfaction Survey?

Go to our website [www.upshot.org.uk](http://www.upshot.org.uk)

Got a question about our product?

Email us at [info@upshot.org.uk](mailto:info@upshot.org.uk)

or

Call us on +44 (0)20 7842 8899

