

Facilities Management Customer Survey Process

FM sends a customer survey with each closed work order. The completed survey is electronically returned to FM and can be viewed via a web report. The web report is titled “*Survey Responses*” and is located under Quick Links on the AiM Work Desk.

FM Managers are expected to review the Survey Responses report and to enter a note on the AiM work order regarding the reason for any unsatisfactory customer rating or comment. The FM Manager will enter their notes on the Aim work order under a note type called Survey Follow-up. The note type will link the FM Manager’s notes in AiM to the Survey Responses web report and will be displayed along with all the other customer survey information.

How to enter a “survey” note on an Aim Work Order:

1. FM Manager will review the Survey Responses report found under Quick Links on their Aim Work Desk to identify surveys that require a survey note. Notes are required for all surveys that have a strongly disagree or poor rating or a negative customer comment.
2. FM Manager will investigate the circumstances of any unsatisfactory customer survey responses; this may include contacting the customer when appropriate.
3. FM Manager will log his/her survey notes on the AiM work order:
The Note for survey follow-up will be added at the work order level and NOT the phase level. Please be careful of the wording of your note as it is permanent and visible to many readers.
 - a. Open the Aim work order
 - b. Click on VIEW
 - c. Select NOTES LOG
 - d. Select the Zoom finder (spy glass) for NOTE TYPE
 - e. Select SURVEY FOLLOWUP
 - f. Type in the survey notes
 - g. Save
 - h. Click on the Green Flags
 - i. Exit the work order
 - j. The FM Manager’s survey notes will now be displayed on the Survey Responses web report along with the other customer survey information.
 - k. End of process

FM Customer Survey Questions

1. The work request was completed in an appropriate time frame.
Strongly Agree, Agree, Disagree, Strongly Disagree
2. The quality of the work performed was:
Excellent, Above Average, Average, Below Average, Poor
3. The courtesy & professionalism exhibited by our staff was:
Excellent, Above Average, Average, Below Average, Poor
4. How would you rate our staff in keeping you informed about your work request?
Excellent, Above Average, Average, Below Average, Poor
5. Please provide us with any additional comments or suggestions (optional)