



COLLEGE FOR
FINANCIAL PLANNING®
A KAPLAN COMPANY

The College for Financial Planning
**Student Satisfaction with College
Services Survey Report**

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Updated March 2019

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Introduction

The Office of Institutional Research and Effectiveness developed a survey to investigate students' satisfaction with non-teaching services at the College for Financial Planning. There were several goals that guided the development of this survey:

1. Evaluate academic advising effectiveness (Master's students only)
2. Evaluate satisfaction with enrollment and account services
3. Evaluate use of and satisfaction with the University Library (Master's students only)
4. Evaluate satisfaction with the online learning platforms and the College website
5. Evaluate whether designation and CFP® requirements were communicated to students (if applicable)
6. Evaluate students' satisfaction with College communication and complaints processes
7. Evaluate whether students feel valued by the College
8. Evaluate overall student satisfaction with their experience at the College

The information was gathered to complement existing College student surveys, particularly the end-of-course evaluations and the graduate surveys, by providing an in-depth look at students' satisfaction with areas of the College that while not directly related to courses could still greatly affect students' satisfaction with their overall educational experience.

Method

The full survey can be found in Appendix A. An email list of current students was generated using the Course Email List within Jasper which pulls all CFP and Designation students who are active in a program, and the Email list for course within term for students enrolled in a course in any of the terms from 1801 to 1901. The survey was administered via SurveyMonkey. Students enrolled in both an M.S. course and a designation or CFP course were only administered the M.S. satisfaction survey. The survey sent to master's students differed slightly from the survey sent to designation and CFP® students (see Appendix A). The email invitation can be found in Appendix B. The complete open-ended comments can be found on the network within H:\Regulatory Affairs\Institutional Effectiveness\Surveys_CourseEvaluations\Services satisfaction surveys\2019. The survey was available for two weeks for students to complete. A reminder was sent to students who had not yet completed the survey one week after the initial email was sent.

Questions with an asterisk are standardized, certified questions that are benchmarked against other industries who have used those questions within SurveyMonkey. Only one of the questions ([Figure 15](#)) could be narrowed down to compare against other educational institutions.

- To calculate a SurveyMonkey Global Benchmark for each question, they find an average response for each individual survey, then add up those individual scores to generate an average across all surveys.
- SurveyMonkey categorizes responses into comparison groups based on factors like industry, size, and location to provide more targeted benchmarks which can be purchased.
- Benchmark data is refreshed quarterly (every 3 months).

Results

Student Services Center

Table 1. Mean SSC scores

Item	Year	Master's			Designations & CFP		
		N	Mean	Standard Deviation	N	Mean	Standard Deviation
<i>I receive prompt service when I call the College's Student Services Center.</i>	2019	19	4.37	1.12	246	4.16	0.95
	2018	18	4.56	0.62	208	4.28	0.91
	2017	11	4.73	0.47	214	4.24	0.85
	2016	23	4.32	0.75	71	4.17	0.94
<i>I receive adequate assistance when I call the College's Student Services Center.</i>	2019	19	4.53	0.96	248	4.17	0.96
	2018	16	4.63	0.62	203	4.22	0.98
	2017	10	4.20	1.32	212	4.19	0.89
	2016	23	4.36	0.76	69	4.23	0.88

The questions with an asterisk shown in Figures 1 - 3 are standardized, certified questions that are benchmarked against multiple industries who have used those questions within SurveyMonkey. The CFFP data in the figures show aggregate responses collected from 2016 through 2019.

Table 2. Mean customer service responsiveness scores

Item	Year	Master's			Designations & CFP		
		N	Mean	Standard Deviation	N	Mean	Standard Deviation
<i>*How responsive have we been to your questions or concerns about our services?</i>	2019	19	4.47	0.77	235	4.17	0.87
	2018	17	4.63	0.50	203	4.24	0.87

Figure 1. How responsive have we been to your questions or concerns about our services?

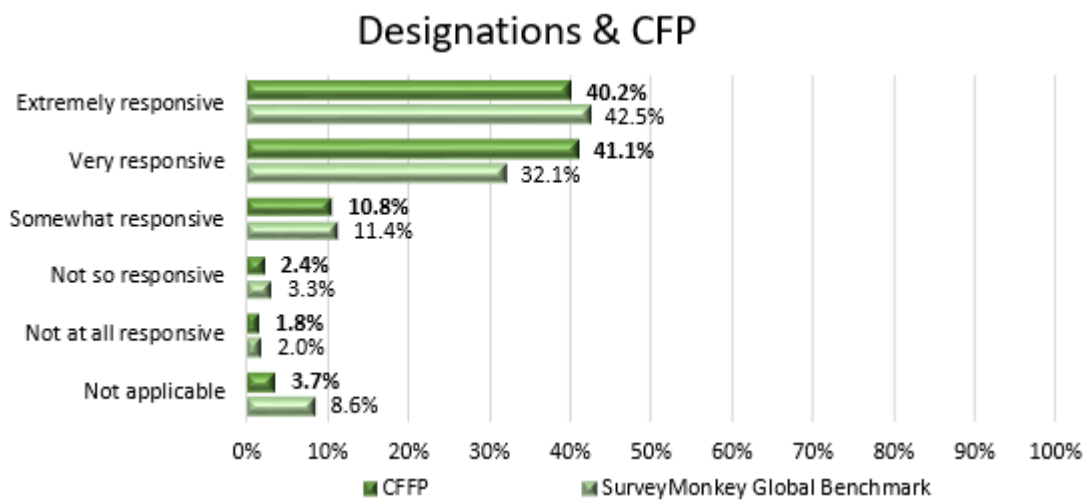
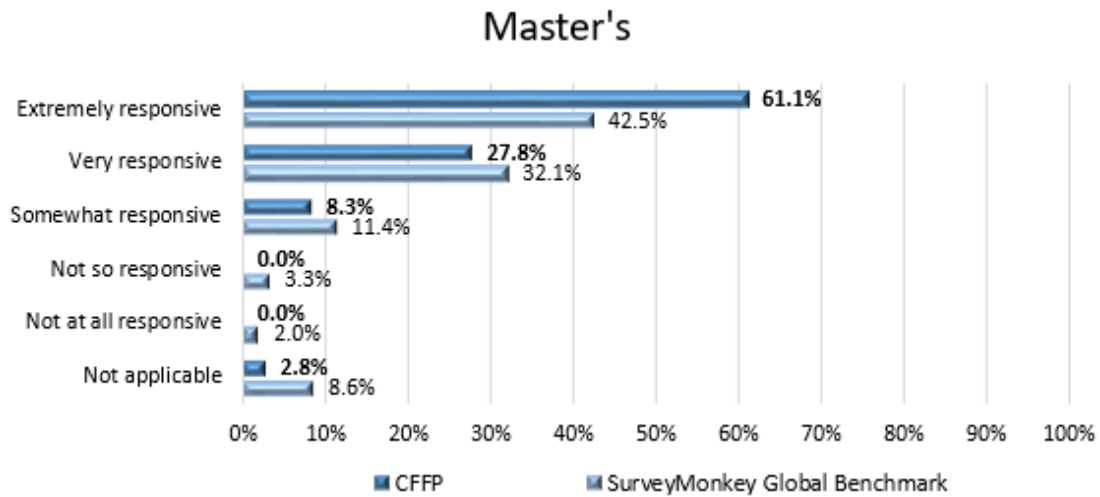


Table 3. Mean customer service helpfulness scores

Item	Year	Master's		Designations & CFP			
		N	Mean	Standard Deviation	N	Mean	Standard Deviation
*How well did our customer service representative answer your question or solve your problem?	2019	19	4.47	0.84	241	4.20	0.87
	2018	17	4.47	0.72	207	4.19	1.01

Figure 2. How well did our customer service representative answer your question or solve your problem?

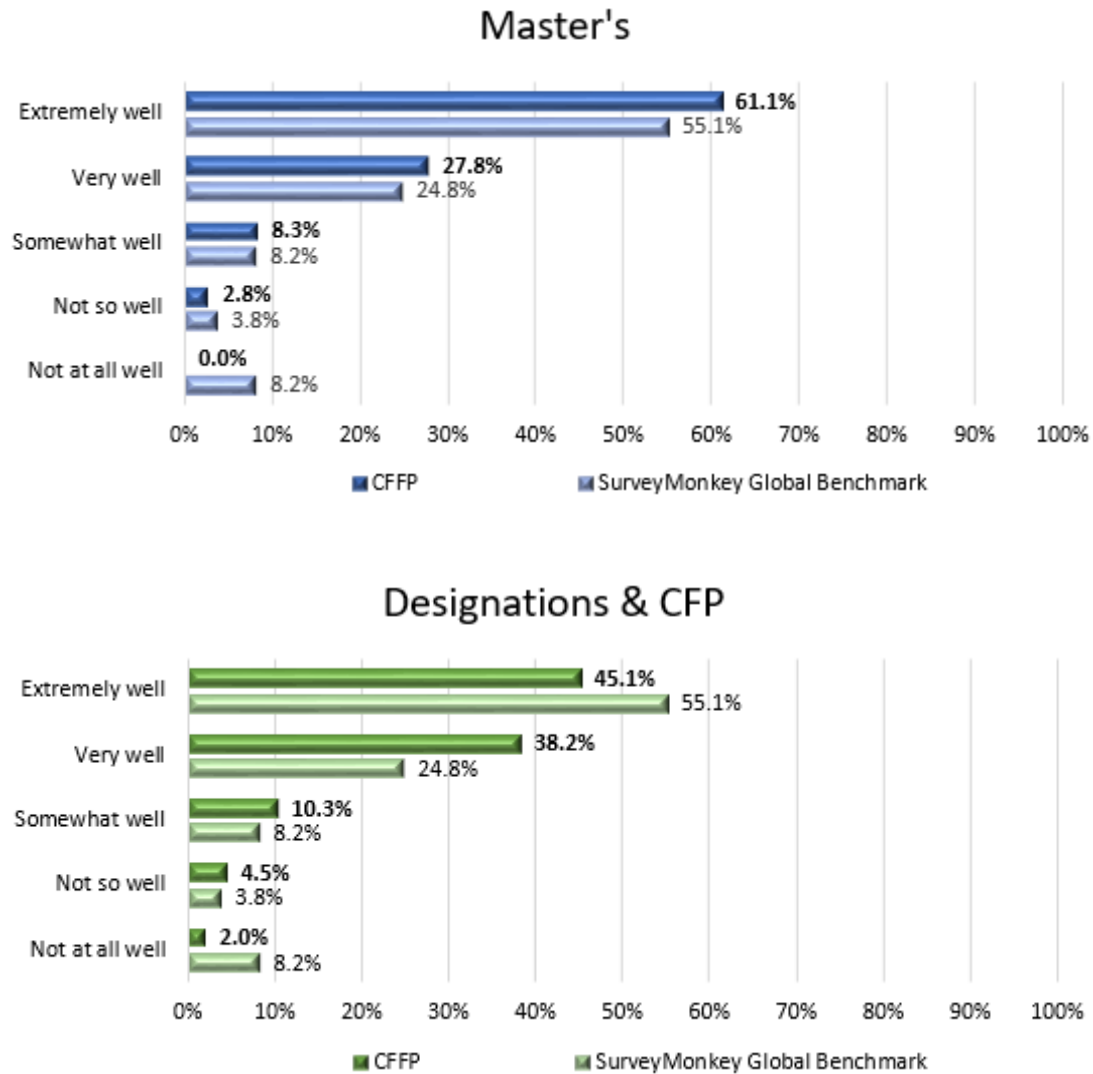


Table 4. Mean customer service overall quality scores

Item	Year	Master's			Designations & CFP		
		N	Mean	Standard Deviation	N	Mean	Standard Deviation
*Overall, how would you rate the quality of your customer service experience?	2019	19	4.74	0.56	244	4.56	0.88
	2018	17	4.82	0.53	207	4.51	0.94

Figure 3. Overall, how would you rate the quality of your customer service experience?

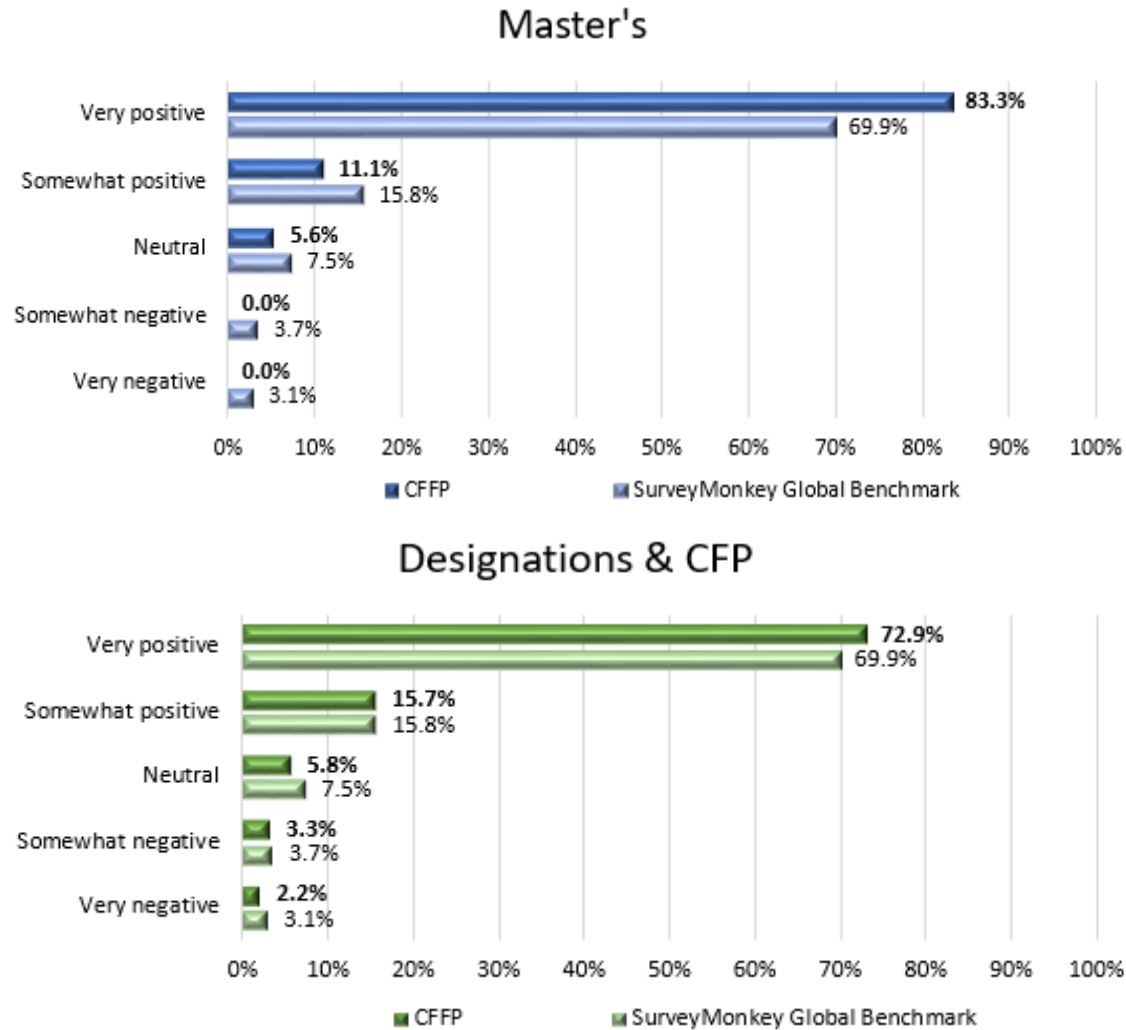


Figure 4. SSC service rating frequencies

Item	Student group	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Not applicable
Prompt service	Master's	1.4%	2.8%	2.8%	35.2%	57.7%	0.0%
	Desig. & CFP	2.4%	3.4%	8.1%	41.9%	44.1%	0.0%
Adequate assistance	Master's	2.9%	1.5%	4.4%	30.9%	60.3%	0.0%
	Desig. & CFP	2.7%	3.1%	10.4%	39.5%	44.3%	0.0%
Responsive to questions	Master's	0.0%	0.0%	8.3%	27.8%	61.1%	2.8%
	Desig. & CFP	1.8%	2.4%	10.8%	41.1%	40.2%	3.7%
Answered question or solved problem	Master's	0.0%	2.8%	8.3%	27.8%	61.1%	0.0%
	Desig. & CFP	2.0%	4.5%	10.3%	38.2%	45.1%	0.0%
Overall quality of experience.	Master's	0.0%	0.0%	5.6%	11.1%	83.3%	0.0%
	Desig. & CFP	2.2%	3.3%	5.8%	15.7%	72.9%	0.0%

Advising and Enrollment

Table 5. Advising and enrollment mean scores

Item	Year	Master's			Designations & CFP		
		N	Mean	Standard Deviation	N	Mean	Standard Deviation
My academic advisor listens to my concerns.	2019	18	4.61	0.50	NA	NA	NA
	2018	19	4.37	0.60	NA	NA	NA
	2017	14	4.43	0.48	NA	NA	NA
	2016	20	4.67	0.48	NA	NA	NA
My academic advisor helps me stay on track in my program.	2019	18	4.44	0.70	NA	NA	NA
	2018	18	4.39	0.70	NA	NA	NA
	2017	14	4.57	0.76	NA	NA	NA
	2016	20	4.52	0.75	NA	NA	NA
It is easy to register for courses.	2019	19	4.37	0.60	314	4.28	0.83
	2018	22	4.68	0.57	260	4.32	0.75
	2017	16	4.56	0.73	256	4.32	0.78
	2016	25	4.26	0.86	94	4.17	0.83
I receive adequate help from an enrollment specialist when registering for my courses.	2019	19	4.68	0.48	314	4.28	0.90
	2018	22	4.55	0.74	260	4.25	0.90
	2017	16	4.31	1.40	256	4.28	0.87
	2016	25	4.37	0.79	94	4.06	0.99
I know what courses I need to take to complete my degree/program.	2019	19	4.63	0.50	314	4.40	0.77
	2018	22	4.64	0.58	260	4.43	0.73
	2017	16	4.69	0.48	256	4.33	0.84
	2016	25	4.15	1.03	94	4.23	0.89

Figure 5. Advising and enrollment rating frequencies

Item	Student group	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
Academic advisor listens	Master's	0.0%	0.0%	5.6%	36.6%	57.7%
	Desig. & CFP	NA	NA	NA	NA	NA
Academic advisor keeps me on track	Master's	0.0%	0.0%	12.9%	27.1%	60.0%
	Desig. & CFP	NA	NA	NA	NA	NA
It is easy to register for courses	Master's	0.0%	1.2%	9.8%	31.7%	57.3%
	Desig. & CFP	1.5%	1.1%	8.9%	43.7%	44.8%
Enrollment specialist helpful registering	Master's	0.0%	2.4%	11.0%	20.7%	65.9%
	Desig. & CFP	2.1%	1.9%	13.2%	34.7%	48.1%
I know what courses I need to take	Master's	0.0%	3.7%	3.7%	31.7%	61.0%
	Desig. & CFP	1.4%	1.6%	6.5%	39.1%	51.4%

Account assistance

Table 6. Account assistance mean scores

Item	Year	Master's			Designations & CFP		
		N	Mean	Standard Deviation	N	Mean	Standard Deviation
<i>The College makes it convenient to pay my tuition and fees.</i>	2019	19	4.37	1.01	314	4.34	0.78
	2018	22	4.68	0.48	260	4.34	0.82
	2017	16	4.69	0.62	256	4.29	0.86
	2016	25	4.41	0.84	94	4.26	0.84
<i>I receive adequate assistance when paying my tuition and fees.</i>	2019	19	4.26	0.99	314	4.19	0.83
	2018	22	4.64	0.58	260	4.22	0.84
	2017	16	4.44	0.73	256	4.08	0.95
	2016	25	4.44	0.75	94	4.00	1.00
<i>Important information about my account is communicated to me promptly.</i>	2019	19	4.37	0.96	314	4.13	0.90
	2018	22	4.59	0.67	260	4.17	0.89
	2017	16	4.19	1.33	256	4.07	0.92
	2016	25	4.30	0.91	94	3.96	0.98

Figure 6. Account assistance rating frequencies

Item	Student group	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
Convenient to pay	Master's	1.2%	1.2%	4.9%	28.0%	64.6%
	Desig. & CFP	1.4%	0.5%	12.8%	35.5%	49.8%
Adequate assistance when paying	Master's	1.2%	0.0%	8.5%	31.7%	58.5%
	Desig. & CFP	1.4%	0.9%	22.0%	32.7%	43.1%
Important account information communicated	Master's	2.4%	3.7%	8.5%	26.8%	58.5%
	Desig. & CFP	1.9%	2.1%	18.7%	37.6%	39.7%

University Library

Table 7. University Library mean scores

Item	Year	Master's			Designations & CFP		
		N	Mean	Standard Deviation	N	Mean	Standard Deviation
<i>The online University Library has the materials I need.</i>	2019	15	4.47	0.83	NA	NA	NA
	2018	16	4.13	0.62	NA	NA	NA
	2017	13	4.62	0.65	NA	NA	NA
	2016	19	4.14	0.91	NA	NA	NA
<i>It is easy for me to retrieve materials from the online University Library.</i>	2019	16	4.00	1.37	NA	NA	NA
	2018	16	3.37	1.31	NA	NA	NA
	2017	13	4.15	1.07	NA	NA	NA
	2016	19	3.71	1.19	NA	NA	NA

Figure 7. Library rating frequencies

Item	Student group	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
University Library has needed materials	Master's	0.0%	3.2%	6.3%	42.9%	47.6%
	Desig. & CFP	NA	NA	NA	NA	NA
University Library materials easy to retrieve	Master's	6.3%	15.6%	7.8%	34.4%	35.9%
	Desig. & CFP	NA	NA	NA	NA	NA

Technology

Table 8. Technology mean scores

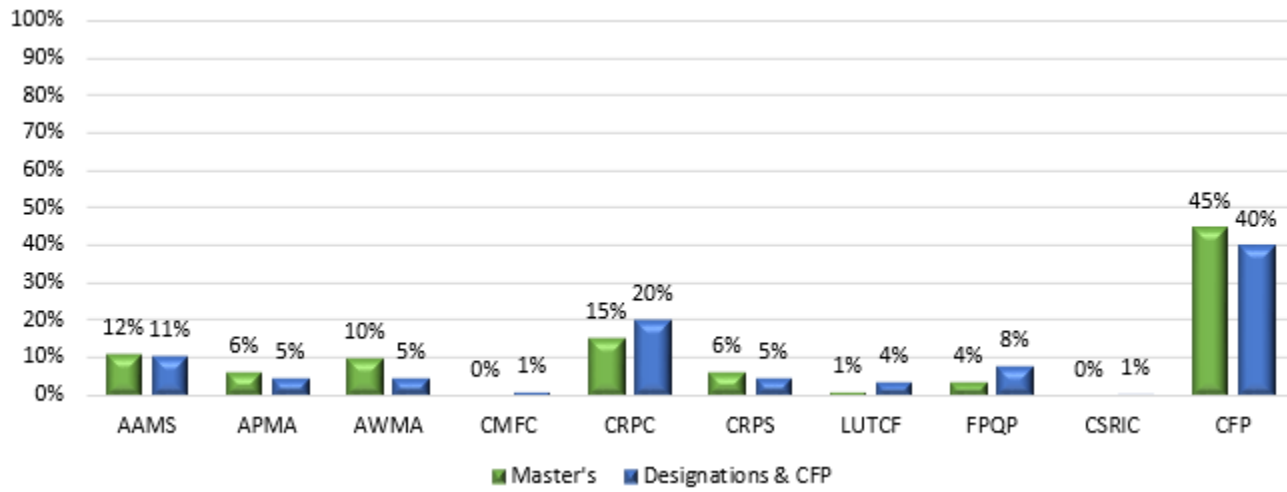
Item	Year	Master's			Designations & CFP		
		N	Mean	Standard Deviation	N	Mean	Standard Deviation
The online learning platform is easy to use.	2019	19	4.05	1.08	314	4.01	1.07
	2018	22	3.55	0.96	260	4.09	0.93
	2017	16	4.63	0.50	256	3.70	0.91
	2016	25	4.67	0.73	94	3.65	1.00
The online learning platform is operational every time I need to use it.	2019	19	4.26	0.73	314	4.14	1.03
	2018	22	4.23	0.92	260	4.05	1.05
	2017	16	4.56	0.51	256	3.75	0.97
	2016	25	4.44	0.89	94	3.66	1.04
I am able to get prompt assistance with technical issues associated with the online learning platform.	2019	19	3.74	1.05	314	3.55	0.95
	2018	22	3.77	0.81	260	3.62	0.95
	2017	16	4.00	0.89	256	3.40	0.83
	2016	25	3.89	1.16	94	3.37	0.88
Technical problems are a constant hassle. (Note: low means are good for this item.)	2019	19	2.58	1.39	314	2.18	1.17
	2018	22	2.27	1.20	260	2.21	1.21
	2017	16	1.87	1.15	256	2.41	1.11
	2016	25	2.52	1.40	94	2.47	1.10
I can quickly find what I am looking for on the College website.	2019	19	3.53	1.54	314	3.75	1.02
	2018	22	3.82	0.66	260	3.82	0.97
	2017	16	3.81	1.05	256	3.64	0.97
	2016	25	4.22	1.19	94	3.72	1.04

Figure 8. Technology rating frequencies

Item	Student group	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
Platform easy to use	Master's	1.2%	6.1%	12.2%	30.5%	50.0%
	Desig. & CFP	3.0%	5.4%	20.0%	40.8%	30.7%
Platform operational	Master's	0.0%	3.7%	9.8%	32.9%	53.7%
	Desig. & CFP	3.5%	6.2%	16.3%	39.2%	34.8%
Prompt technical assistance with platform	Master's	0.0%	6.1%	39.0%	18.3%	36.6%
	Desig. & CFP	2.2%	3.8%	54.0%	21.0%	19.0%
Technical problems constant hassle	Master's	30.5%	32.9%	18.3%	6.1%	12.2%
	Desig. & CFP	31.9%	27.8%	26.1%	8.5%	5.6%
Quickly find information on College website	Master's	4.9%	9.8%	15.9%	32.9%	36.6%
	Desig. & CFP	2.8%	9.0%	21.9%	44.3%	22.1%

Designation and CFP® program logistics

Figure 9. Designation and CFP® enrollment



Notes. Percentages for M.S. students are based upon students who indicated enrollment in a designation or CFP program, not all M.S. respondents. AAMS® = Accredited Asset Management SpecialistSM, APMA® = Accredited Portfolio Management AdvisorSM, AWMA® = Accredited Wealth Management AdvisorSM, CMCF® = Chartered Mutual Fund CounselorSM, CRPC® = Chartered Retirement Planning CounselorSM, CRPS® = Chartered Retirement Plans SpecialistSM, FPQPTM = Financial Planner Qualified ProfessionalTM

Only master’s students who responded “yes” to the following question were asked to respond to questions in Table 9. (I have enrolled in a designation or CFP® program at the College.)

Table 9. Designation and CFP® logistics mean scores

Item	Year	Master’s			Designations & CFP		
		N	Mean	Standard Deviation	N	Mean	Standard Deviation
The 6-month testing deadline for my designation program was clearly explained to me when I enrolled.	2019	11	4.27	0.90	329	4.26	0.97
	2018	13	4.54	0.52	268	4.25	1.02
	2017	7	3.86	1.22	267	4.27	1.01
	2016	9	3.78	0.97	96	3.82	1.22
The process for submitting courses for my continuing education (CE) credit was clearly explained when I enrolled.	2019	11	3.82	1.25	329	3.40	1.13
	2018	13	4.00	1.23	268	3.41	1.21
	2017	7	3.98	0.90	267	3.39	1.17
	2016	9	3.89	0.93	96	3.30	1.24
The process to sign up for taking my designation exam at a testing center was clearly explained.	2019	11	4.18	0.87	329	3.70	1.08
	2018	13	4.46	0.78	268	3.74	1.12
	2017	7	4.00	0.82	267	3.61	1.13
	2016	9	3.89	0.93	96	3.52	1.23

Figure 10. Designation and CFP® logistics rating frequencies

Item	Student group	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
Testing deadline clearly explained	Master's	0.0%	5.0%	17.5%	32.5%	45.0%
	Desig. & CFP	3.3%	5.7%	7.1%	33.6%	50.2%
Process for submitting CE credit clearly explained	Master's	0.0%	12.5%	25.0%	22.5%	40.0%
	Desig. & CFP	7.6%	13.9%	30.5%	27.7%	20.3%
Testing center sign up clearly explained	Master's	0.0%	2.5%	20.0%	35.0%	42.5%
	Desig. & CFP	4.6%	12.4%	20.6%	36.7%	25.7%

Information seeking and complaints

Table 10. Information seeking and complaints mean scores

Students were able to choose “not applicable” for the following items. These “not applicable” responses are included in the figures, but were coded as missing data for the descriptive statistics.

Item	Year	Master's			Designations & CFP		
		N	Mean	Standard Deviation	N	Mean	Standard Deviation
I get the “run around” when seeking information. (Note: low means are good for this item.)	2019	19	1.63	0.90	265	1.97	0.96
	2018	22	1.68	0.58	224	2.10	1.09
	2017	16	2.00	1.20	252	2.02	0.95
	2016	25	1.96	0.96	87	2.11	1.05
When I have a question or problem, I know who to contact.	2019	19	4.32	0.89	278	3.84	1.02
	2018	22	4.29	0.72	236	3.97	0.92
	2017	16	3.94	1.34	252	3.82	1.01
	2016	25	3.80	1.16	87	3.85	1.04
My complaints are handled appropriately.	2019	19	2.11	2.16	184	3.49	0.95
	2018	22	3.69	0.86	155	3.74	0.94
	2017	16	3.82	0.87	252	3.49	0.94
	2016	25	3.93	1.00	60	3.48	0.97

Figure 11. Information seeking and complaints rating frequencies

Item	Student group	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Not applicable
Get the “run-around” when seeking information	Master's	35.4%	36.6%	14.6%	2.4%	1.2%	9.8%
	Desig. & CFP	30.1%	35.3%	16.9%	3.3%	3.3%	11.0%
Know who to contact with questions/problems	Master's	2.4%	7.3%	12.2%	32.9%	42.7%	2.4%
	Desig. & CFP	2.4%	7.6%	15.1%	41.9%	25.5%	7.5%
Complaints handled appropriately	Master's	0.0%	2.4%	20.7%	18.3%	17.1%	41.5%
	Desig. & CFP	1.8%	2.4%	28.6%	15.8%	12.0%	39.4%

Impressions of College representatives

Table 11. Impressions of College representative mean scores

Students were able to choose “not applicable” for the following items. These “not applicable” responses are included in the figures, but were coded as missing data for the descriptive statistics.

Item	Year	Master's			Designations & CFP		
		N	Mean	Standard Deviation	N	Mean	Standard Deviation
<i>College representatives are knowledgeable.</i>	2019	19	4.68	0.48	274	4.12	0.86
	2018	22	4.55	0.61	237	4.23	0.93
	2017	16	4.38	0.89	252	4.21	0.89
	2016	25	4.16	0.85	86	4.07	0.89
<i>College representatives are courteous.</i>	2019	19	4.79	0.42	271	4.29	0.82
	2018	22	4.63	0.50	234	4.45	0.76
	2017	16	4.63	0.81	252	4.29	0.88
	2016	25	4.40	0.71	87	4.28	0.82
<i>College representatives are trustworthy.</i>	2019	19	4.68	0.58	269	4.12	0.87
	2018	22	4.53	0.61	228	4.23	0.85
	2017	16	4.44	0.81	252	4.13	0.91
	2016	25	4.20	0.82	87	3.97	0.95
<i>The separate departments of the College work effectively to serve students' needs.</i>	2019	19	3.95	1.27	225	3.79	0.94
	2018	22	4.10	0.85	192	3.82	0.94
	2017	16	4.00	0.93	252	3.72	0.93
	2016	25	4.13	0.87	72	3.56	0.93

Figure 12. Impressions of College representatives rating frequencies

Item	Student group	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Not applicable
College representatives knowledgeable	Master's	0.0%	2.4%	7.3%	32.9%	53.7%	3.7%
	Desig. & CFP	1.8%	1.7%	14.0%	35.5%	38.3%	8.8%
College representatives courteous	Master's	0.0%	1.2%	3.7%	26.8%	63.4%	4.9%
	Desig. & CFP	1.3%	1.2%	9.0%	33.3%	45.5%	9.6%
College representatives trustworthy	Master's	0.0%	0.0%	13.4%	25.6%	56.1%	4.9%
	Desig. & CFP	1.1%	1.2%	19.4%	29.9%	37.3%	11.1%
Separate departments work effectively	Master's	0.0%	1.2%	25.6%	28.0%	37.8%	7.3%
	Desig. & CFP	1.2%	2.1%	30.5%	20.8%	20.0%	25.4%

Overall experience with the College

Table 12. Overall experience with the College mean scores

Item	Year	Master's			Designations & CFP		
		N	Mean	Standard Deviation	N	Mean	Standard Deviation
<i>The College values me as a student.</i>	2019	19	4.26	0.81	277	3.73	1.02
	2018	22	4.14	0.66	227	3.93	1.02
	2017	16	4.25	1.07	252	3.76	1.02
	2016	25	4.00	1.00	87	3.74	0.95
<i>*Overall, how satisfied or dissatisfied are you with the College for Financial Planning?</i>	2019	19	4.84	0.37	307	4.25	1.08
	2018	22	4.73	0.55	256	4.31	0.96
	2017	16	4.38	1.03	252	4.04	1.11
	2016	23	4.33	0.87	88	3.86	1.10

Figure 13. Overall, how satisfied or dissatisfied are you with the College for Financial Planning?

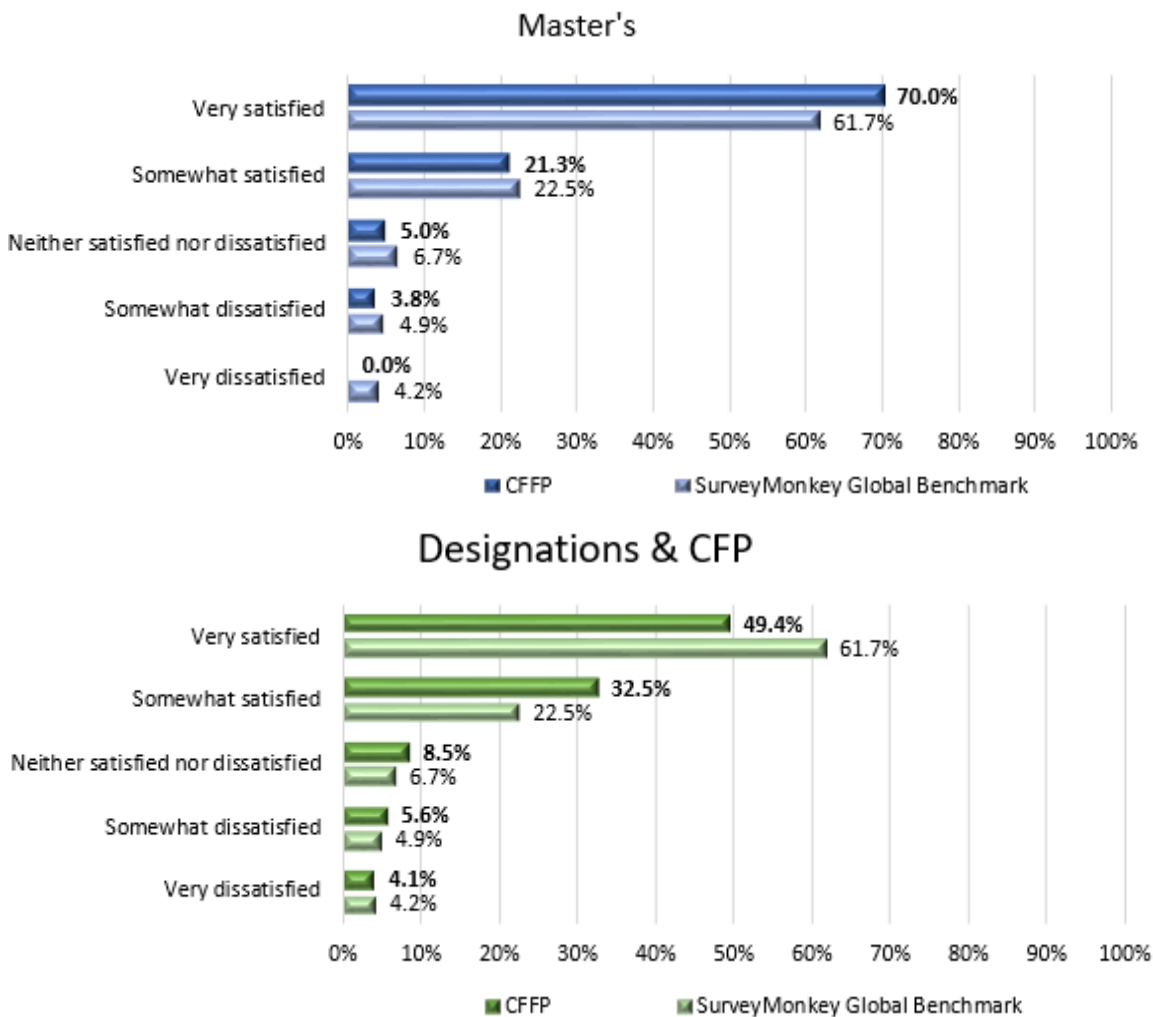


Figure 14. Overall experience with the College rating frequencies

Item	Student group	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Not applicable
College values me as a student	Master's	0.0%	4.9%	17.1%	34.1%	41.5%	2.4%
	Desig. & CFP	3.2%	4.2%	26.2%	32.3%	25.3%	8.8%
Overall, satisfaction with the College	Master's	0.0%	3.8%	5.0%	21.3%	70.0%	0.0%
	Desig. & CFP	4.1%	5.6%	8.5%	32.5%	49.4%	0.0%

The results of the Net Promoter Score (NPS) question represent the net percentage of our customers who are promoters of the College.

Students were asked the following question, “How likely is it that you would recommend the College for Financial Planning to a friend or colleague?” and given the following rating scale (Not at all likely) 0 1 2 3 4 5 6 7 8 9 10 (Extremely likely). Based on their responses, they fall into one of three groups: Detractors, Passives, or Promoters.

Group	Score	Description
Promoters	9-10	Loyal enthusiasts who will stay with your company and urge their friends and colleagues to do the same.
Passives	7-8	Satisfied but unenthusiastic customers who can be easily wooed by the competition.
Detractors	0-6	Unhappy customers who have the potential to damage your brand.

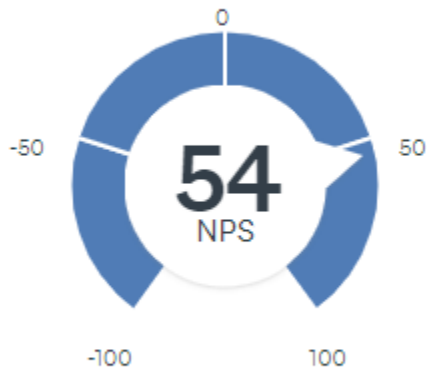
Table 13. Net Promoter Scores

Fiscal Year 2018 results	Detractors (rated 0 to 6)	Passives (rated 7 or 8)	Promoters (rated 9 or 10)	Net Promoter® Score
CFFP (Master’s)	7.3%	31.7%	61.0%	54
CFFP (Designations & CFP)	20.6%	32.7%	46.7%	26
SurveyMonkey Education Sector	16.4%	25.5%	58.1%	42
SurveyMonkey Global Benchmark	24.8%	24.1%	51.1%	26

Figure 15. How likely is it that you would recommend the College for Financial Planning to a friend or colleague?

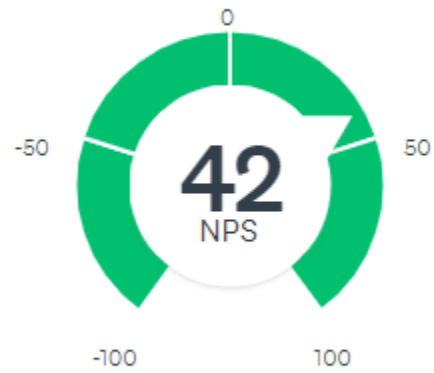
Master's Programs

Your Net Promoter® Score



Answered: 41 Skipped: 53

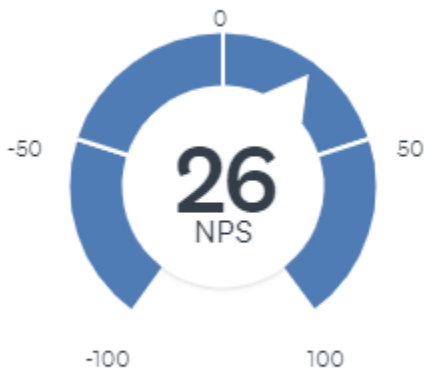
Education ▼



Average from 3,242 Organizations
1/1/2018 - 12/31/2018

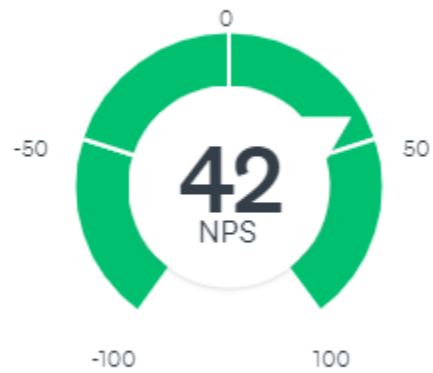
Designation & CFP Programs

Your Net Promoter® Score



Answered: 563 Skipped: 451

Education ▼

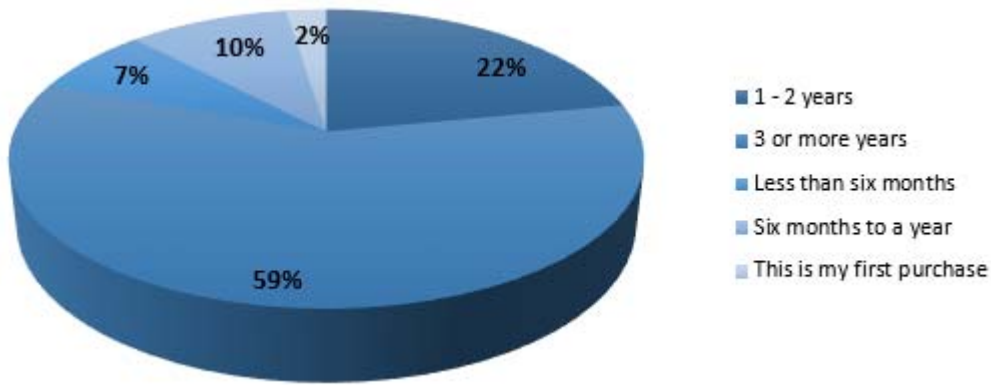


Average from 3,242 Organizations
1/1/2018 - 12/31/2018

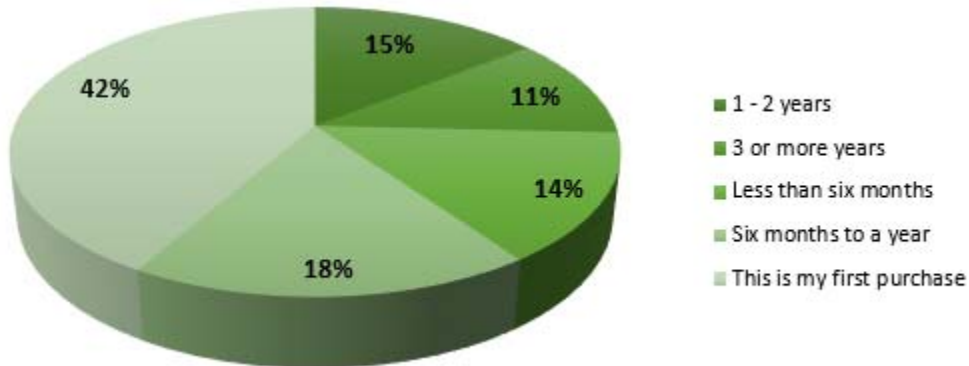
NPS®, Net Promoter® & Net Promoter® Score are registered trademarks of Satmetrix Systems, Inc., Bain & Company and Fred Reichheld

Figure 16. How long have you been a customer of the College for Financial Planning?

Master's Programs



Designation & CFP Programs



Appendix A: Student Satisfaction with Services Survey

Notes. These questions did not appear in the same order for both groups of students. Questions that appeared only on the M.S. student version of the survey are italicized.

The College for Financial Planning cares about your satisfaction with your educational experience. Your feedback is extremely important, as it helps the College to improve the services offered to students. Please answer the following questions to the best of your ability, and be honest! Your responses will not be linked to your name in any way.

1. I have communicated with the Student Services Center at least once.
 - a. Yes
 - b. No

Only students who selected “yes” to question 1 see questions 2 - 6.

2. Please indicate your level of agreement with each of the following statements: (strongly disagree, disagree, neither disagree nor agree, agree, strongly agree)
 - a. I receive prompt service when I call the College’s Student Services Center.
 - b. I receive adequate assistance when I call the College’s Student Services Center.
3. *How responsive have we been to your questions or concerns about our services? (Extremely responsive, Very responsive, Somewhat responsive, Not so responsive, Not at all responsive, NA)
4. *How well did our customer service representative answer your question or solve your problem? (Extremely well, Very well, Somewhat well, Not so well, Not at all well)
5. *Overall, how would you rate the quality of your customer service experience? (Very positive, Somewhat positive, Neutral, Somewhat negative, Very negative)
6. Please comment on your experiences with the Student Services Center. (open-ended)
7. *I have interacted with my academic advisor at least once.*
 - a. Yes
 - b. No

Only students who selected “yes” to question 7 see question 8.

8. *Please indicate your level of agreement with each of the following statements. (strongly disagree, disagree, neither disagree nor agree, agree, strongly agree)*
 - a. *My academic advisor listens to my concerns.*
 - b. *My academic advisor helps me stay on track in my program.*
9. Please indicate your level of agreement with each of the following statements. (strongly disagree, disagree, neither disagree nor agree, agree, strongly agree)
 - a. It is easy to register for courses.
 - b. I receive adequate help from an enrollment specialist when registering for my courses.
 - c. I know what courses I need to take to complete my degree.
 - d. The College makes it convenient to pay my tuition and fees.
 - e. I receive adequate assistance when paying my tuition and fees.
 - f. Important information about my account is communicated to me promptly.
10. Please comment on your experiences with enrollment and/or advising. (open-ended)
11. *I use the online University Library to complete assignments.*
 - a. Yes

b. No

Only students who selected “yes” to question 11 see questions 12 and 13.

12. Please indicate your level of agreement with the following statements. (strongly disagree, disagree, neither disagree nor agree, agree, strongly agree)
 - a. The online University Library has the materials I need.
 - b. It is easy for me to retrieve materials from the online University Library.
13. Please comment on your experiences with the University Library. (open-ended)
14. Please indicate your level of agreement with each of the following statements. (strongly disagree, disagree, neither disagree nor agree, agree, strongly agree)
 - a. The online learning platform is easy to use.
 - b. The online learning platform is operational every time I need to use it.
 - c. I am able to get prompt assistance with technical issues associated with the online learning platform.
 - d. Technical problems are a constant hassle.
 - e. I can quickly find what I am looking for on the College website.
15. Please comment on your experiences with College technology services and support. (open-ended)
16. I have enrolled in a designation or CFP® program at the College.
 - a. Yes
 - b. No

Only students who selected “yes” for question 16 see questions 17 - 19.

17. Indicate the program(s) in which you have enrolled (choose one or more):
 - a. Accredited Asset Management Specialist (AAMS®)
 - b. Accredited Domestic Partnership Advisor (ADPA®)
 - c. Accredited Portfolio Management Advisor (APMA®)
 - d. Accredited Wealth Management Advisor (AWMA®)
 - e. Chartered Mutual Fund Counselor (CMFC®)
 - f. Chartered Retirement Planning Counselor (CRPC®)
 - g. Chartered Retirement Plans Specialist (CRPS®)
 - h. Foundations in Financial Planning (RP®)
 - i. Life Underwriter Training Council Fellow (LUTCF®)
 - j. Certified Financial Planner (CFP®)
18. Please indicate your level of agreement with the following statements. (strongly disagree, disagree, neither disagree nor agree, agree, strongly agree)
 - a. The 6-month testing deadline for my designation program was clearly explained to me when I enrolled.
 - b. The process for submitting courses for my continuing education (CE) credit was clearly explained when I enrolled.
 - c. The process to sign up for taking my designation exam at a testing center was clearly explained.
19. Please comment on your experiences with your designation program. (open-ended)
20. Please indicate your level of agreement with each of the following statements. (strongly disagree, disagree, neither disagree nor agree, agree, strongly agree, not applicable)
 - a. I get the “run-around” when seeking information.

- b. When I have a question or problem, I know who to contact.
 - c. My complaints are handled appropriately.
 - d. College representatives are knowledgeable.
 - e. College representatives are courteous.
 - f. College representatives are trustworthy.
 - g. The separate departments of the College work effectively to serve students' needs.
 - h. The College values me as a student.
 - i. Overall, I am satisfied with my experience with the College for Financial Planning.
21. Please comment on your overall experience with the College. (open-ended)
22. *How long have you been a customer of the College for Financial Planning? (This is my first purchase, less than six months, six months to a year, 1-2 years, 3 or more years, I haven't made a purchase yet)
23. *How likely is it that you would recommend the College for Financial Planning to a friend or colleague? (0: Not at all likely to 10: Extremely likely)
24. *Overall, how satisfied or dissatisfied are you with the College for Financial Planning? (Very satisfied, Somewhat satisfied, Neither satisfied nor dissatisfied, Somewhat dissatisfied, Very dissatisfied)

Thank you very much for taking the time to complete this survey. Your thoughts are important to us and we appreciate your insights. We wish you continued success in your academic endeavors. If you have any questions or would like to provide us with any additional feedback, please contact the Office of Institutional Research and Effectiveness at cffpresearch@cftp.edu.

Appendix B: Survey Invitation Email



Dear [first name],

We invite you to take part in this important survey measuring student satisfaction with the services offered by the College for Financial Planning. Please share your thoughts and opinions regarding your experience so far, so that we may better serve you in the future. This survey typically takes about 5 minutes to complete, and is entirely voluntary. All of your answers will be confidential, and only aggregated data will be reported.

[Take the Survey](#)

The survey will close on **Friday, February 21** at midnight.

Thank you so much for providing us with valuable feedback. We appreciate you taking the time to do so. If you have any questions or would like to provide us with any additional feedback, please contact the Office of Institutional Research and Effectiveness at cffpresearch@cftp.edu.

Best wishes for your continued educational success!

Office of Institutional Research and Effectiveness
College for Financial Planning

Call: 800.237.9990 | **Click:** www.cffpinfo.com



If you do not wish to receive further emails from us, please click [here](#).

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