

# Sample Satisfaction Survey

## Deferred Compensation Plan Questionnaire 2018

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### INTRODUCTION

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Your opinion matters to us! We are conducting an important study on the services that **PARTNER** employees receive from their Deferred Compensation retirement plan. We'd like very much to include your opinions in the study.

Nationwide is the company that manages the Plan, sends statements, and provides services to employees who participate in the Plan. Nationwide will use the results of this study to improve the service it provides to you.

Please be assured that any information you provide will remain confidential, so feel free to be candid with your comments. The survey will close at midnight on **xx**.

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### Screener Questions

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A. Which category best describes your current status with **PARTNER**? Are you.....

1. Currently employed by **PARTNER**
2. Retired from **PARTNER** [Skip to Q1/Terminate after QC]  
(Determine with partner if want retirees in sample)
3. No longer employed by **PARTNER** [Skip to QC, then terminate]
4. Don't know [Skip to QC, then terminate]

B. Are you currently making voluntary contributions to your employer's 457(b) deferred compensation plan?

1. Yes
2. No
3. Don't know

C. Do you know that you can remain in the **PARTNER**'s Deferred Compensation retirement plan during retirement or after leaving service? This includes having access to all the resources and tools the Plan provides.

1. Yes
2. No
3. Don't know

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**PLAN OVERALL**

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Please think about your deferred compensation plan *overall*. Also, please keep in mind that this is a survey about the administrative services in the plan, not about the investments offered in the plan or investment performance.

1. Now I'd like you to think **overall** about all of the service you receive from Nationwide. All things considered, which one of the following statements best describes your level of satisfaction?

- |   |     |
|---|-----|
| I am <b>extremely satisfied</b> with the service I receive  | - 5 |
| I am <b>very satisfied</b> with the service I receive       | - 4 |
| I am <b>somewhat satisfied</b> with the service I receive   | - 3 |
| I am <b>not very satisfied</b> with the service I receive   | - 2 |
| I am <b>not at all satisfied</b> with the service I receive | - 1 |

- 1b. What is the primary reason for choosing [\[INSERT RATING FROM Q.1a\]](#) as your rating?  
(Please be as specific as possible.) [\[OPEN END\]](#)

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2. All things considered, how would you rate the **overall quality** of your deferred compensation program and the services it offers you?

- 5. Excellent
- 4. Very Good
- 3. Good
- 2. Fair
- 1. Poor

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### SERVICE USAGE AND SATISFACTION WITH SERVICE

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3. Which of the following have you done in the past 12 months?  
[NA = NOT AWARE OF SERVICE, DK = DON'T KNOW]

(RANDOMIZE)	Yes	No	NA	DK
a. Called the Nationwide Customer Service Center's Toll-free 800 number and talked with a representative by telephone.	- 1	- 2	- 8	- 9
b. Called or met with local Nationwide staff dedicated to the <b>PARTNER</b> 's deferred compensation plan.	- 1	- 2	- 8	- 9
c. Logged onto the <b>PARTNER</b> 's deferred compensation plan website maintained by Nationwide with retirement plan, account, and transaction options. (Found here: <a href="http://www.URL.com">www.URL.com</a> ).	- 1	- 2	- 8	- 9
d. Reviewed an email or direct mail regarding the deferred compensation plan.	- 1	- 2	- 8	- 9
e. Reviewed the Quarterly Account Statement.	- 1	- 2	- 8	- 9

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4. [IF 'YES' IN 3A] How satisfied are you overall with the **Representatives of the Nationwide Customer Service Center's toll-free 800 number?**

Extremely satisfied	- 5
Very satisfied	- 4
Somewhat satisfied	- 3
Not very satisfied	- 2
Not at all satisfied	- 1

- 4a. Please rate how much you agree or disagree with the following statements about the **Representatives of the Nationwide Customer Service Center's toll-free 800 number.**  
[RANDOMIZE.]

Strongly agree	- 5
Agree	- 4
Neutral	- 3
Disagree	- 2
Strongly disagree	- 1

- A. They provide information appropriate to my situation.
- B. They have strong problem resolution skills.
- C. They are knowledgeable.
- D. They resolve/complete requests in a timely manner.
- E. They are professional and courteous.

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5. [IF 'YES' IN 3B] How satisfied are you overall with the **Local PARTNER Nationwide staff** on each of the following items?

Extremely satisfied	- 5
Very satisfied	- 4
Somewhat satisfied	- 3
Not very satisfied	- 2
Not at all satisfied	- 1

- 5a. Please rate how much you agree or disagree with the following statements about the **Local PARTNER Nationwide staff**.

[RANDOMIZE.]

Strongly agree	- 5
Agree	- 4
Neutral	- 3
Disagree	- 2
Strongly disagree	- 1

- A. They have strong problem resolution skills.
- B. They help me make informed decisions.
- C. They provide information appropriate to my situation.
- D. They explain the benefits of deferred compensation.
- E. They are professional and courteous.

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6. [IF 'YES' IN 3C] How satisfied are you overall with the **PARTNER's deferred compensation plan website?**

- |                      |     |
|----------------------|-----|
| Extremely satisfied  | - 5 |
| Very satisfied       | - 4 |
| Somewhat satisfied   | - 3 |
| Not very satisfied   | - 2 |
| Not at all satisfied | - 1 |

6a. Please rate how much you agree or disagree with the following statements about the **PARTNER's deferred compensation plan website.**  
[RANDOMIZE.]

- |                   |     |
|-------------------|-----|
| Strongly agree    | - 5 |
| Agree             | - 4 |
| Neutral           | - 3 |
| Disagree          | - 2 |
| Strongly disagree | - 1 |

- A. There is a range of information provided.
- B. The website is easy to navigate.
- C. It is easy to make changes to my account (including contributions, investments, allocations, beneficiaries, or other).
- D. It is easy to access my account.
- E. The available education materials (e.g., presentations, videos, articles) are helpful.

6b. Have you used the My Interactive Retirement Planner<sup>SM</sup> tool on the plan website? (An on-line interactive planning tool which helps you set your retirement planning goals, including your retirement savings, pension and social security, to help determine how much money you will need in retirement.)

- 1. Yes
- 2. No

6c. [IF 'YES' IN 6b] How satisfied are you overall with the tools offered on the web, specifically **My Interactive Retirement Planner<sup>SM</sup>** tool, which helps you set your retirement planning goals, including your retirement savings, pension and social security?

- |                      |     |
|----------------------|-----|
| Extremely satisfied  | - 5 |
| Very satisfied       | - 4 |
| Somewhat satisfied   | - 3 |
| Not very satisfied   | - 2 |
| Not at all satisfied | - 1 |

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7. [IF 'YES' IN 3D] How satisfied are you overall with the **PARTNER's Email or Mail Communication** you receive?

Extremely satisfied	- 5
Very satisfied	- 4
Somewhat satisfied	- 3
Not very satisfied	- 2
Not at all satisfied	- 1

7a. Please rate how much you agree or disagree with the following statements about the **PARTNER's Email or Mail Communication**.

[RANDOMIZE.]

Strongly agree	- 5
Agree	- 4
Neutral	- 3
Disagree	- 2
Strongly disagree	- 1

- A. Communications are relevant and timely.
- B. There is a range of information provided.
- C. Messages are easy to understand.
- D. Messages make it easy for me to take action.
- E. Messages help keep retirement planning on my mind.

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8. [IF 'YES' IN 3E] How satisfied you are overall with the **Quarterly Account Statements**?

Extremely satisfied	- 5
Very satisfied	- 4
Somewhat satisfied	- 3
Not very satisfied	- 2
Not at all satisfied	- 1

8a. Please rate how much you agree or disagree with the following statements about the **Quarterly Account Statements**.

[RANDOMIZE.]

- A. The statements are accurate.
- B. The statements are timely.
- C. The information in the statements is clear and easy to understand.
- D. There is a range of information provided.



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**ECONOMY**

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9. Over the past 12 months, how well would you say that your **457(b) deferred compensation plan** has performed?

Extremely well	- 5
Very well	- 4
Somewhat well	- 3
Not very well	- 2
Not well at all	- 1

10. How much do you agree with the following statement?

“During the *past 12 months*, the **PARTNER**’s deferred compensation plan has, in general, provided me with very good investment and retirement savings opportunities.”

Strongly agree	- 5
Agree	- 4
Neutral	- 3
Disagree	- 2
Strongly disagree	- 1

11. Now I’d like you to think about the economy **overall** in the past 12 months. All things considered, which one of the following statements best describes your view of the economy?

I think the economy has gotten better in the past 12 months	- 1
I think the economy has stayed the same in the past 12 months	- 2
I think the economy has gotten worse in the past 12 months	- 3

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12. [Ask current employees only.] Do you plan to increase the amount you contribute to **PARTNER**'s Deferred Compensation plan this year?

- I have already increased my contributions this year. - 1
- I plan to increase my contributions before the end of this year. - 2
- I'm still deciding about changing my contributions this year. - 3
- I do not plan to increase my contributions this year. - 4

13. If you could recommend one change or improvement to **PARTNER**'s Deferred Compensation plan, what would it be? *(Please be as specific as possible.)*

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**DEMOGRAPHICS**

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13. What is your age in years? [Open-ended. Range 18+]
14. Which of the following is the highest level of education you have completed?
- |                                     |     |
|-------------------------------------|-----|
| 8th Grade or less                   | - 1 |
| Some high school                    | - 2 |
| Completed high school or have GED   | - 3 |
| Some college                        | - 4 |
| Completed college                   | - 5 |
| Graduate studies or advanced degree | - 6 |
| I prefer not to answer.             | - 9 |
15. What is your gender?
- |                         |     |
|-------------------------|-----|
| Male                    | - 1 |
| Female                  | - 2 |
| Other                   | -3  |
| I prefer not to answer. | - 9 |
16. Which of the following best describes you?
- |   |     |
|---|-----|
| Not married and not living with a domestic partner (single, separated/divorced, widowed)    | - 1 |
| Married/partnered and the primary wage earner for your household                            | - 2 |
| Married/partnered and a secondary or equal (but not primary) wage earner for your household | - 3 |
| I prefer not to answer.   | - 9 |
17. Which category best represents your total household income before taxes?
- |                              |     |
|------------------------------|-----|
| Less than \$30,000           | - 1 |
| \$30,000 to under \$50,000   | - 2 |
| \$50,000 to under \$70,000   | - 3 |
| \$70,000 to under \$100,000  | - 4 |
| \$100,000 to under \$150,000 | - 5 |
| \$150,000 to under \$200,000 | - 6 |
| \$200,000 or more            | - 7 |
| I prefer not to answer.      | - 9 |

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18. Which category best represents the current value of your total household savings and investments, excluding the value of real estate or any businesses that you own or the value of any workplace retirement plans, such as your 457(b) deferred compensation plan?

Less than \$25,000	- 1
\$25,000 to less than \$50,000	- 2
\$50,000 to less than \$100,000	- 3
\$100,000 to less than \$250,000	- 4
\$250,000 or more	- 5
I prefer not to answer.	- 9

**Thank you for your feedback!**