



Compass Ideas IDEA-146

Frontline Feedback Button — Concepts

2. Attach Documents & Notes ☒ 2. Establish Beneficiaries ☒
3. Summary & Submit ☒ 3. Prepare Estate Package ☒
4. Assign Estate Specialist ☒

Case Information

Product Details Case Details Notes

PRODUCT DETAILS

CATEGORY	PART OF ESTATE
No Items	

Provide Compass Feedback

Help | Français | Sign Off | Clipboard

Compass

Feedback

Refresh

Refresh

Functions

Products, Programs and Offers

Compass

Welcome!
Your opinion is important. After your visit, would you be willing to answer a few questions?

Yes No

My Worklist

Product Originator

Take Action

Provide Compass Feedback

Now that you've completed the task, we would appreciate your feedback.

Click the Begin button below to complete a short survey.

Begin

Contents

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17. Option 4: Feedback link at end of a flow/task

Version History

v1.0: Original document created, reviewed internally.

v1.1:

- Removed 'Footer' option from previous version.
- Revised with the addition of two new Options and 'Recommended Approach' with links to a supporting article.

Recommended Approach

“How can you get average users to respond? The highest response rates come when surveys are quick and painless. And the best way to reduce users' time and suffering is to reduce the number of questions.”

Survey bloat is a natural consequence of having a diverse group of marketing managers, all of whom want customer feedback on their special issues. Please resist the temptation to collect all the information that anybody could ever want. You will end up with no information (or misleading information) instead.”

- NNGroup <https://www.nngroup.com/articles/keep-online-surveys-short/>

Recommended Approach continued

It's become acceptable for websites ask for feedback in order to improve. It can be incorporated in many ways; asking users while using the site, soliciting feedback at the end of a checkout or similar process, or by following up afterwards by email with a link to a survey. Some examples where it works well:

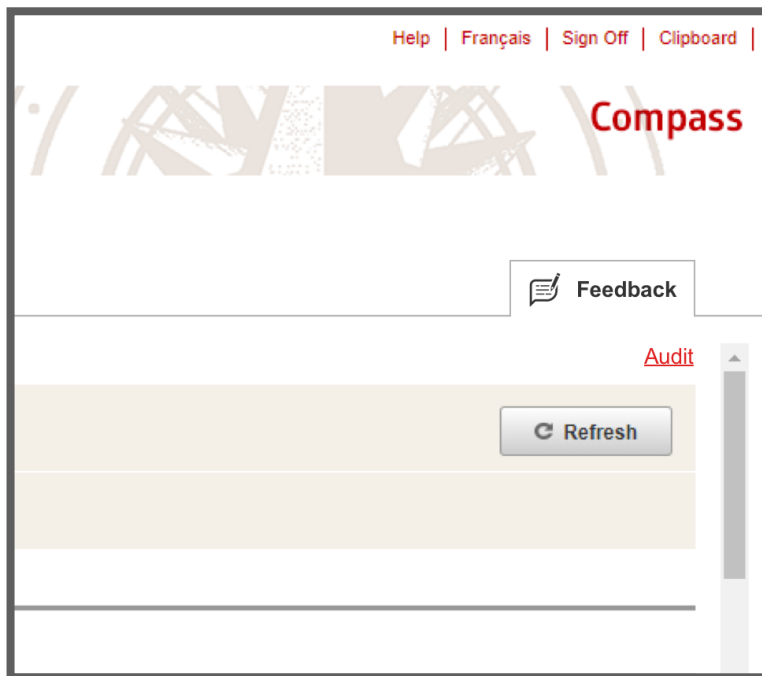
Sonos.com uses a third-party solution to gather feedback, opening a popup (similar to Option 3) where visitors are asked 3 questions with multiple choice answers, then finished with an open field asking users what they valued most about the website. This approach is good for obtaining feedback on a specific flow, but if we were to implement it, we would miss out on feedback on the rest of Compass.

Telus provides a feedback link on each page of their site (similar to Option 1 and 2), displayed just above the footer. Clicking opens a survey in a new window, with questions asking for the reason of their visit, with multiple choice questions on how difficult it was to complete their task or find information,

Gathering the data:

- In the spirit of Agile, I recommend keeping the survey short and simple initially, gather replies and then revise questions (this isn't something we do once and forget). When we see trends in the feedback we can update to ask for more specific details about any issues raised.
- Results of the survey can be submitted to a new email mailbox for Compass feedback.
- There are software solutions that gather the results, but in the end the information will have to be processed by staff who are familiar with Compass and understand the context of the questions being asked. Reports will need to be created, highlighting the common, most mentioned items.

Option 1: Feedback link displayed as a Tab.



Pros:

- Button is available for staff to submit feedback easily and at any time (vs an approach where the button only appears after completion of a task).
- Always visible, without need to scroll, in order to see it.

Cons:

- Having this so easily accessible could result in an incredible volume of feedback that requires a lot of reading, categorization and organization into reports before it can be helpful.



Estate Case Manager

[Switch to Landing Page](#)

Banking Centre Representative
Log off
Clipboard

My Worklist
Search

Links
My Learning Course
Executor Guidebook
Probate Process
Immediate Expenses

Home
Search Cases Fr
Jessica Doe

Jessica Doe

1 First St Mainville AL CA A1B2C3
905-456-7890

Pending-ProcessingEstate
(EC-18052900001)

Date of Death: Feb 12, 2018
NEC Specialist:

Estate Status View

Estate Case Opened
Preparing the Estate
Processing the Estate
Estate Case Closed

1. Collect Information
2. Attach Documents & Notes
3. Summary & Submit
4. Assign Estate Specialist

1. Establish Executors
2. Establish Beneficiaries
3. Prepare Estate Package

1. Sign Estate Package
1. Close Estate Case

CLIENT DOCUMENTS

TYPE	FILE
No attachments	

Add Documents

CLIENT NOTES

Add Notes

Case Information

Product Details
Case Details
Notes

PRODUCT DETAILS

CATEGORY	PART OF ESTATE	PRODUCT TYPE	SUB TYPE	PERSONAL OR BUSINESS	ACCOUNT #	DATE OF NOTIFICATION VALUE	PRODUCT STATUS
No items							

CIBC PRODUCT TOTAL VALUE:
OTHER FI PRODUCT VALUE:
TOTAL VALUE:

EUR0.00
EUR0.00
EUR0.00

- Feedback link available as a tab — PEGA UI7.

Clicking opens a survey in the tab (example mock-up of that on page 8).

Compass Ideas IDEA-146 - Frontline Feedback Button

January 7, 2020

6



Banking that fits your life.

RESL PA @ Branch 00927

DMD | SES

Help | Français | Sign Off | Clipboard

Work group

Case Search

My Cases

My WorkList

ON-19081495018

1

Feedback

+

SOMERS, SUE (CEDDPOD) ; BOURELLE, JEFFREY (CEDDPOD)

Refresh

+

Navigator

Needs Assessment

Recommendation

Product Origination

Needs Assessment

Additional Parties

About You

About Your Needs

About You

SOMERS, SUE

BOURELLE, JEFFREY

Residential Status

*Are you a permanent Canadian resident?

☐ Yes

☐ No

Specialized Programs

*We have several specialized programs available. Do any of the following apply to you ?

☐ Student

1. Feedback link as a tab— PEGA UI6.

Selecting the tab displays a survey (example on the following page).



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DMD JES

[Help](#) | [Français](#) | [Sign Off](#) | [Clipboard](#)

Work group
Case Search
My Cases
My WorkList
ON-19081495018

Feedback



Provide Compass Feedback

1. Question number one dapibus cras consectetur 2

2. Question number two, please choose from this scale:

Very bad

0

Fair

1

Very good

2

3

4

5

6

7

8

9

10

Bad
Good
Outstanding

3. Question number three dapibus cras consectetur

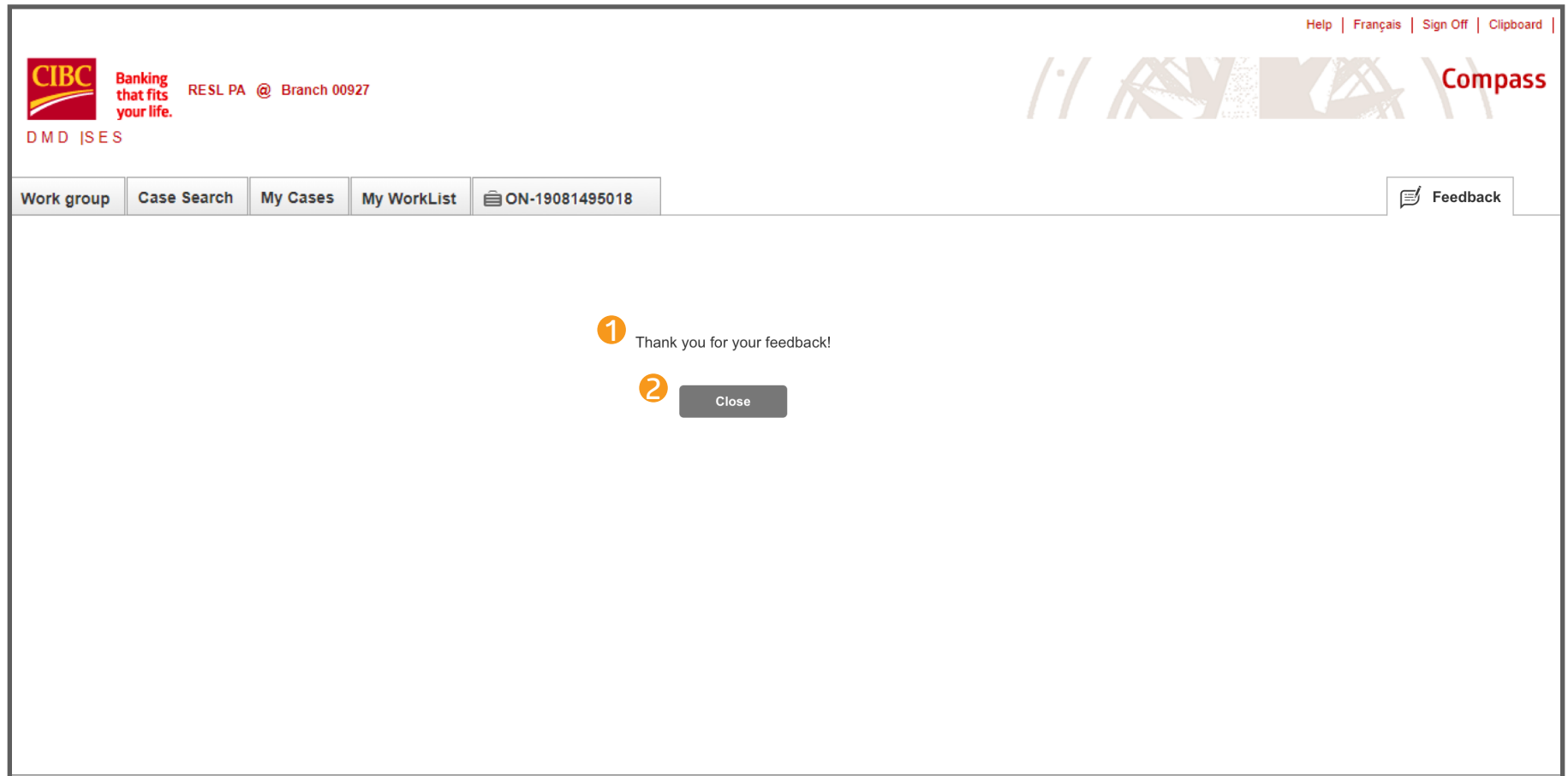
4. Question number four dapibus cras consectetur

←

→

4

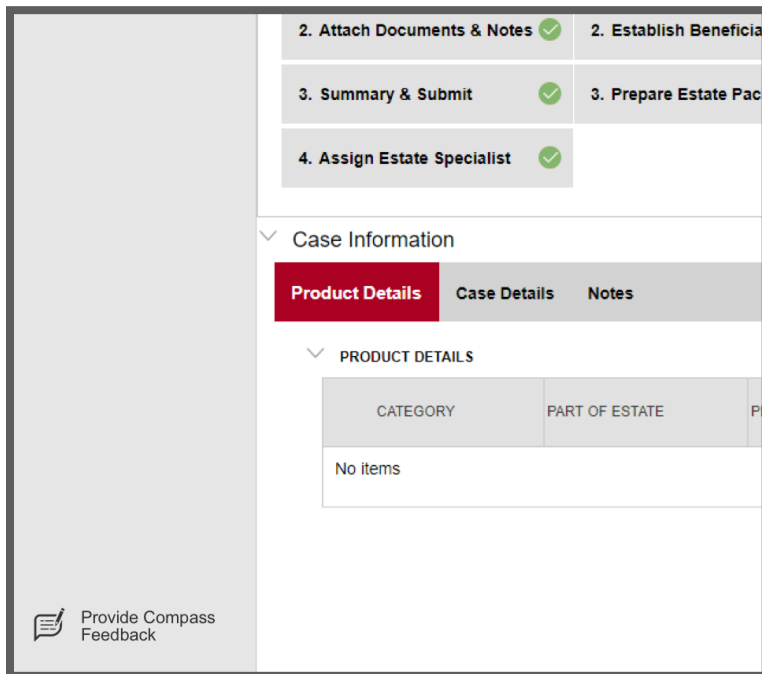
1. Selecting tab displays survey in the tab, within Compass. The feedback tab changes its state to show that it is the open tab, in the forefront.
2. Example survey questions are used here to illustrate possible formatting. Each could be answered using an open field.....
3. Or questions could be answered using a graphical set of buttons representing a scale. Or a mixture of both.
4. 'Back' and 'Next' (or arrow) buttons used if feedback questions are displayed across multiple pages. It's best to keep few questions per screen or users may worry about the length and not complete it.
The Back (left) arrow/button is only active after the first page, if there are multiple pages.
The final Next (right) arrow/button acts as a 'Submit' button on the last page, submitting the user's answers.



1. Message upon successful completion and submission of answers.
2. Close button — when feedback is presented in a tab, this returns the user to the open case, or My WorkList tab, if no cases are open.

RECOMMENDATION: Feedback question fields should be treated as 'optional' to avoid errors when submitted. Users should be allowed to skip fields they do not wish to answer, or feel are not applicable. Having to correct errors and try again would result in many users giving up on sending feedback at all.

Option 2: Feedback link in the existing sidebar.



The screenshot shows a web application interface. On the left is a sidebar with a feedback button labeled "Provide Compass Feedback" with a speech bubble icon. The main content area displays a task list at the top with four items, each with a green checkmark: "2. Attach Documents & Notes", "2. Establish Beneficia", "3. Summary & Submit", and "4. Assign Estate Specialist". Below this is a section titled "Case Information" with a dropdown arrow. Under "Case Information" are three tabs: "Product Details" (active), "Case Details", and "Notes". Below the tabs is a section titled "PRODUCT DETAILS" with a dropdown arrow. Under "PRODUCT DETAILS" is a table with two columns: "CATEGORY" and "PART OF ESTATE". The table is currently empty, showing "No items".

Pros:

- Button is available for staff to submit feedback easily and at any time (vs an approach where the button only appears after completion of a task).

Cons:

- Just like Option 1, having the feedback button so conveniently available could result in an incredible volume of feedback that requires reading, categorization and organization into reports to be manageable.
- Having it at the bottom of the screen means it's not always visible unless users scroll to the bottom of the screen.



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Help | Français | Sign Off | Clipboard

DMD | SES

Work group

Case Search

My Cases

My WorkList

ON-19081495018

+

SOMERS, SUE (CEDDPOD) ; BOURELLE, JEFFREY (CEDDPOD)

Refresh

✦ Navigator

Needs Assessment

Recommendation

Product Origination

Needs Assessment

Additional Parties

> About You

About Your Needs

1

Feedback

About You

SOMERS, SUE

BOURELLE, JEFFREY

Residential Status

*Are you a permanent Canadian resident?

☐ Yes
 ☐ No

Specialized Programs

*We have several specialized programs available. Do any of the following apply to you ?

☐ Student

1. Feedback link in the existing sidebar — PEGA UI6

Compass Ideas IDEA-146 - Frontline Feedback Button

January 7, 2020

11



Estate Case Manager
Switch to Landing Page

Banking Centre Representative
Log off
Clipboard

My Worklist
Search
Links
My Learning Course
Executor Guidebook
Probate Process
Immediate Expenses

Home
Search Cases Fr
Jessica Doe

Jessica Doe
Refresh
Close

1 First St Mainville AL CA A1B2C3
905-456-7890

Pending-ProcessingEstate
(EC-18052900001)

Date of Death: Feb 12, 2018
NEC Specialist:

Estate Status View

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Preparing the Estate
Processing the Estate
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2. Attach Documents & Notes
3. Summary & Submit
4. Assign Estate Specialist

1. Establish Executors
2. Establish Beneficiaries
3. Prepare Estate Package

1. Sign Estate Package
1. Close Estate Case

Case Information

Product Details
Case Details
Notes

PRODUCT DETAILS

CATEGORY	PART OF ESTATE	PRODUCT TYPE	SUB TYPE	PERSONAL OR BUSINESS	ACCOUNT #	DATE OF NOTIFICATION VALUE	PRODUCT STATUS
No items							

1

Provide Compass Feedback

CLIENT DOCUMENTS

TYPE	FILE
No attachments	

Add Documents

CLIENT NOTES

Add Notes

CIBC PRODUCT TOTAL VALUE:

EUR0.00

OTHER FI PRODUCT VALUE:

EUR0.00

TOTAL VALUE:

EUR0.00

1. Feedback link in the existing sidebar – PEGA UI7

Compass Ideas IDEA-146 - Frontline Feedback Button

January 14, 2020

12

Estate Case Manager

Switch to Landing Page

Banking Centre Representative Log off Clipboard

Home Search Cases Fr Jessica Doe

My Worklist Search

Links My Learning Course Executor Guidebook Probate Process Immediate Expenses

1 First St Main 905-456-7890

Estate Status View

Estate Case Op

1. Collect Information

2. Attach Documents

3. Summary & Submit

4. Assign Estate Spec

Case Information

Product Details

PRODUCT DETAIL

CATEGORY

No Items

Provide Compass Feedback

1. Question number one dapibus cras consectetur

2. Question number two, please choose from this scale:

Very bad Fair Very good

0 1 2 3 4 5 6 7 8 9 10

Bad Good Outstanding

3. Question number three dapibus cras consectetur

4. Question number four dapibus cras consectetur

← →

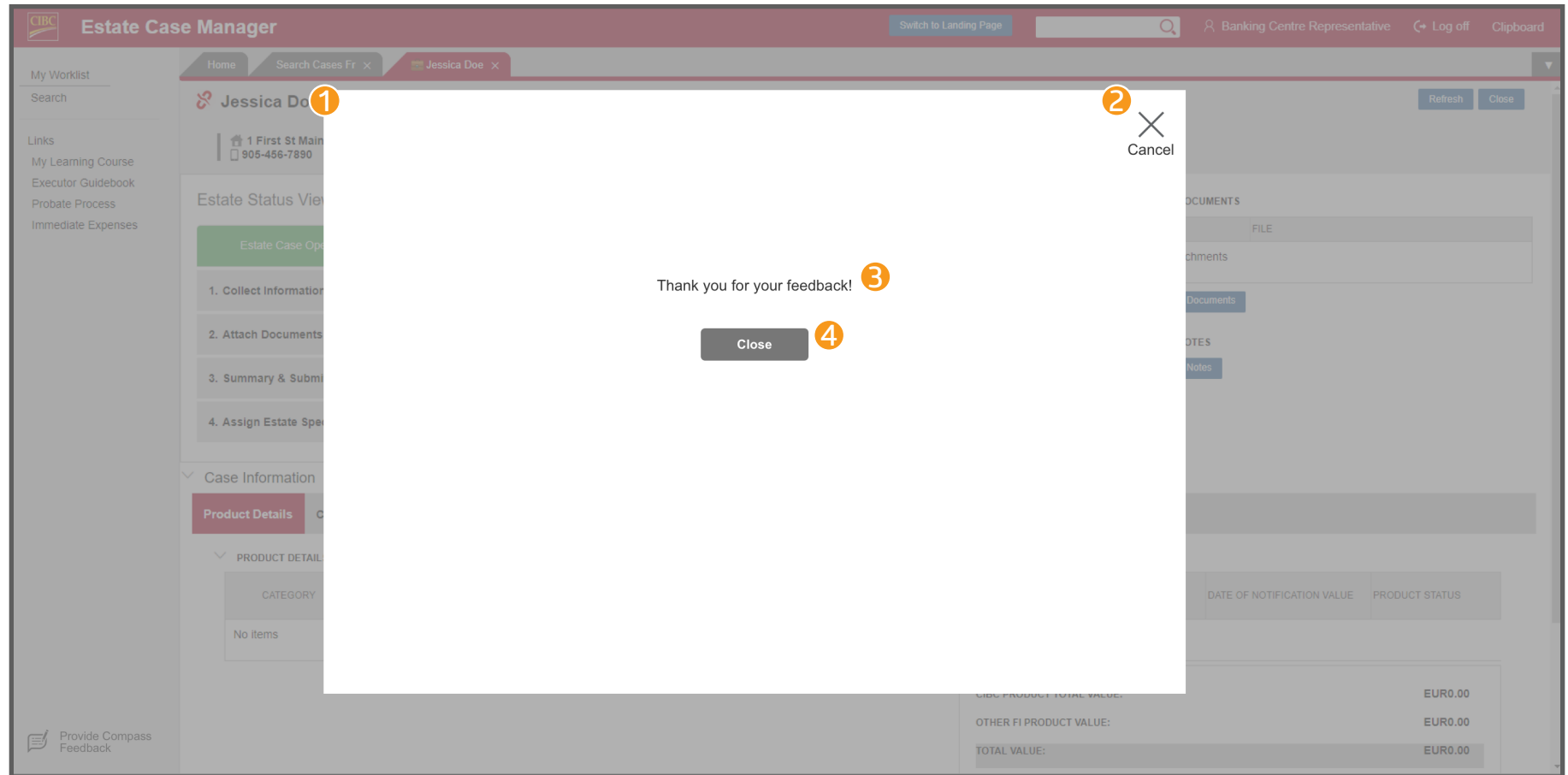
DATE OF NOTIFICATION VALUE PRODUCT STATUS

CIBC PRODUCT TOTAL VALUE: EUR0.00

OTHER FI PRODUCT VALUE: EUR0.00

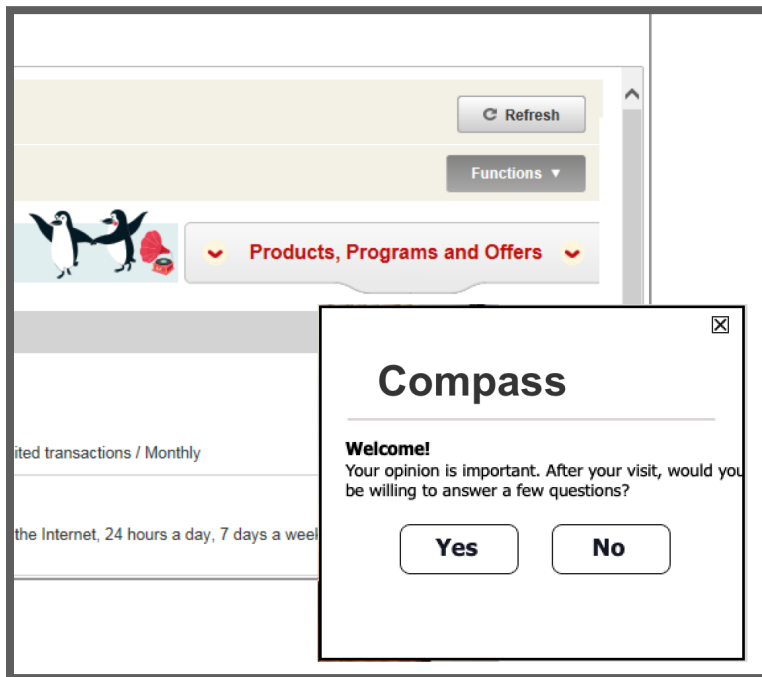
TOTAL VALUE: EUR0.00

- Feedback link opens a survey in a modal layer over the Compass screen, dimming the background to focus the user's attention on the survey content.
- A close button is required to dismiss the modal layer, should the user change their mind or click the link accidentally.
- Survey questions can be answered in an open field.
- Questions could be answered using a graphical set of buttons representing a scale.
- 'Back' and 'Next' (or arrow) buttons used if feedback questions are displayed across multiple pages.
The Back (left) arrow/button is only active after the first page, if there are multiple pages.
The Next (right) arrow/button acts as a 'Submit' button on the last page, submitting the user's answers.



1. Modal window with dimmed background.
2. Close/Cancel button.
3. 'Success' and 'Thank you' message, which provides feedback to the user that their submission was successfully received.
4. Close button (provides same functionality as #2 Close/Cancel) closes the modal layer and deactivates the background window dimming, returning the user to the screen, slightly visible in the background.

Option 3: Feedback CTA at end of a task/flow:

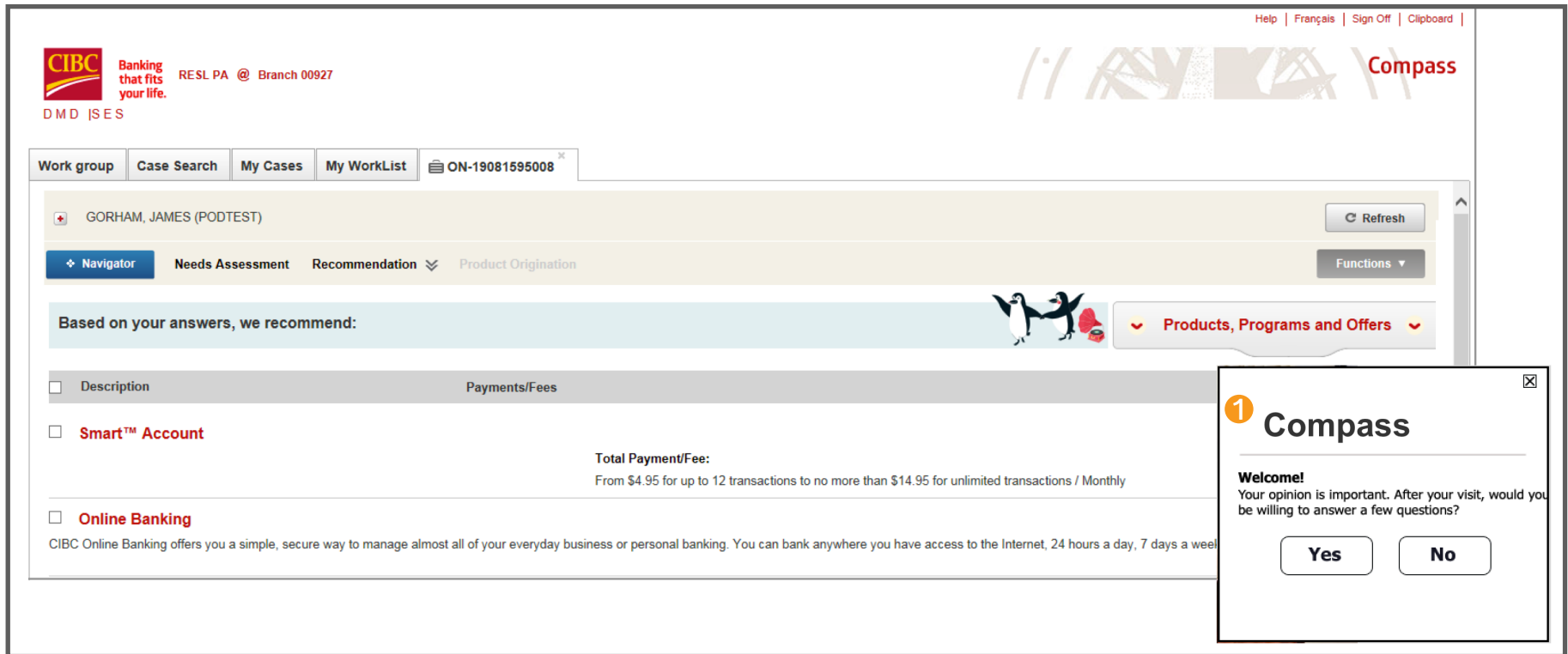


Pros:

- Useful for more scenarios than at the end of a completed flow/task
- Feedback can focus on specific screens.
- This approach would reduce the feedback to a more focused and manageable volume.

Cons:

- The Call to action popup could be forgotten in the background, when staff get busy and have many windows open, and not be completed.
- The popup might be dismissed as distracting and closed, resulting in lower completion numbers.



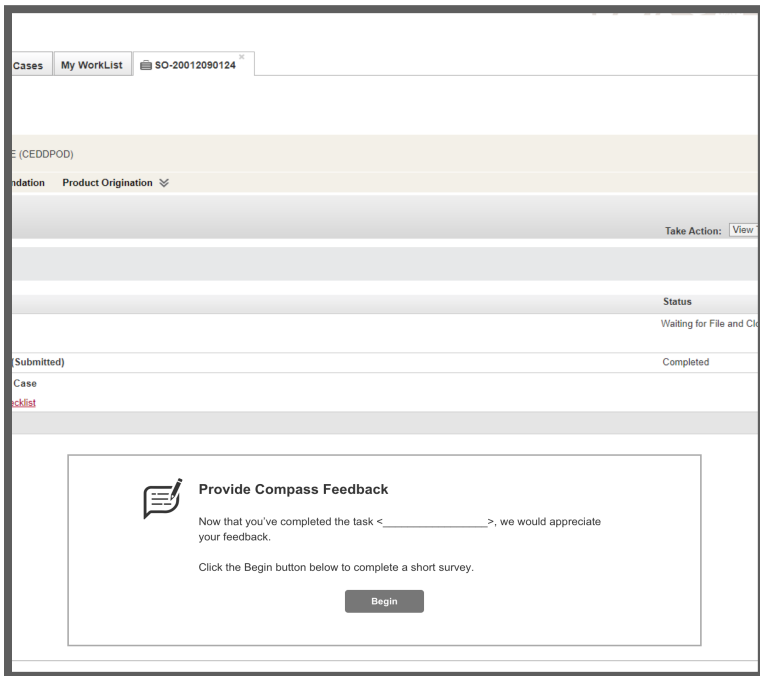
The screenshot shows a CIBC Compass web application interface. At the top, there's a header with the CIBC logo, the tagline "Banking that fits your life.", and user information: "RESL PA @ Branch 00927". Navigation links include "Help", "Français", "Sign Off", and "Clipboard". Below the header, there's a "Work group" section with tabs for "Case Search", "My Cases", and "My WorkList", and a search bar containing "ON-19081595008". The main content area displays a "Needs Assessment" section for "GORHAM, JAMES (PODTEST)". It includes a "Navigator" with options like "Needs Assessment", "Recommendation", and "Product Origination". A "Based on your answers, we recommend:" section lists "Smart™ Account" and "Online Banking" with checkboxes. A "Total Payment/Fee" section shows a range from \$4.95 to \$14.95 per month. A "Products, Programs and Offers" dropdown is also visible. A "Compass" feedback popup is overlaid on the right, asking "Welcome! Your opinion is important. After your visit, would you be willing to answer a few questions?" with "Yes" and "No" buttons.

1. Feedback CTA opens in a small window, Answering 'Yes' launches the survey in a new window, which the user can complete when they have time.

Selecting 'No' dismisses the CTA and does not bother the user any further.

A decision would have to be made for when this panel opens, offering the survey based on distinct criteria.

Option 4: Feedback CTA at end of a task/flow:



The screenshot shows a web interface with a top navigation bar containing 'Cases', 'My WorkList', and a search bar with 'SO-20012090124'. Below the navigation bar, there's a section titled 'E (CEDDPOD)' with a sub-section 'ndation Product Origination'. A 'Take Action: View' button is visible. Below this, there's a 'Status' section with 'Waiting for File and Cl'. A 'Submitted' status is shown, followed by a 'Case' section with a 'Checklist' link. At the bottom, a 'Provide Compass Feedback' modal is displayed, containing the text: 'Now that you've completed the task < >, we would appreciate your feedback. Click the Begin button below to complete a short survey.' and a 'Begin' button.

Pros:

- Feedback button is only available at the end of a task, which is good for asking specific questions about what was completed.
- Feedback is more helpful in making improvements to specific screens and flows.
- This approach would reduce the feedback to a more focused and manageable volume.

Cons:

- The feedback button wouldn't be available to all users unless they complete a task/flow where the button is placed at the end. This would not allow general feedback and comments on issues where we did expect there to be feedback.



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Help | Français | Sign Off | Clipboard

Compass

Work group

Case Search

My Cases

My WorkList

SO-20012090124

LEWANDOWSKI, KATHERINE (CEDDPOD)

Refresh

Needs Assessment

Recommendation

Product Origination

Navigator

Take Action: View Tasks

Select a task to perform

Tasks	Status
Product & Client Details	Waiting for File and Close
Client File and Close	
CIBC Smart™ Plus Account (Submitted)	Completed
File Documents and Close Case	
File & Close Document Checklist	
Review Case Information	

1



Provide Compass Feedback

Now that you've completed the task <_____, we would appreciate your feedback.

Click the Begin button below to complete a short survey.

2

Begin

1. Feedback CTA is displayed at the end of a flow, or when a task is finished, asking the user to give feedback on what they've just completed.
2. Message copy gives users an expectation for the length of survey, to encourage participation.