



College for
Financial Planning®
EDUCATING THE NATION'S TOP FINANCIAL ADVISORSSM

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

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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 (M.S. students only)
2. Evaluate satisfaction with enrollment and account services
3. Evaluate use of and satisfaction with the University Library (M.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 GDP – Email list for course within term from STARS for students enrolled in a course in any of the terms from 1701 to 1801. 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 M.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\FY2018. 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 mean scores

Item	Fiscal Year	M.S. Mean (SD)	D/CFP Mean (SD)
I receive prompt service when I call the College's Student Services Center.	FY2018	4.56 (0.62)	4.28 (0.91)
	FY2017	4.73 (0.47)	4.24 (0.85)
	FY2016	4.32 (0.75)	4.17 (0.94)
I receive adequate assistance when I call the College's Student Services Center.	FY2018	4.63 (0.62)	4.22 (0.98)
	FY2017	4.20 (1.32)	4.19 (0.89)
	FY2016	4.36 (0.76)	4.23 (0.88)

The questions shown in Figures 1 - 3 are standardized, certified questions that are benchmarked against multiple industries who have used those questions within SurveyMonkey.

Table 2. Mean customer service responsiveness scores

Item	Fiscal Year	M.S. Mean (SD)	D/CFP Mean (SD)
*How responsive have we been to your questions or concerns about our services?	FY2018	4.63 (0.50)	4.24 (0.87)

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

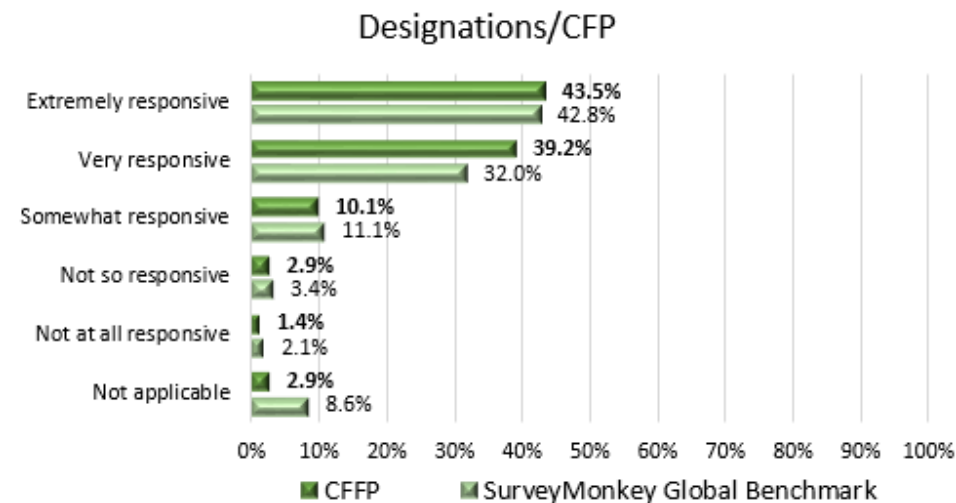
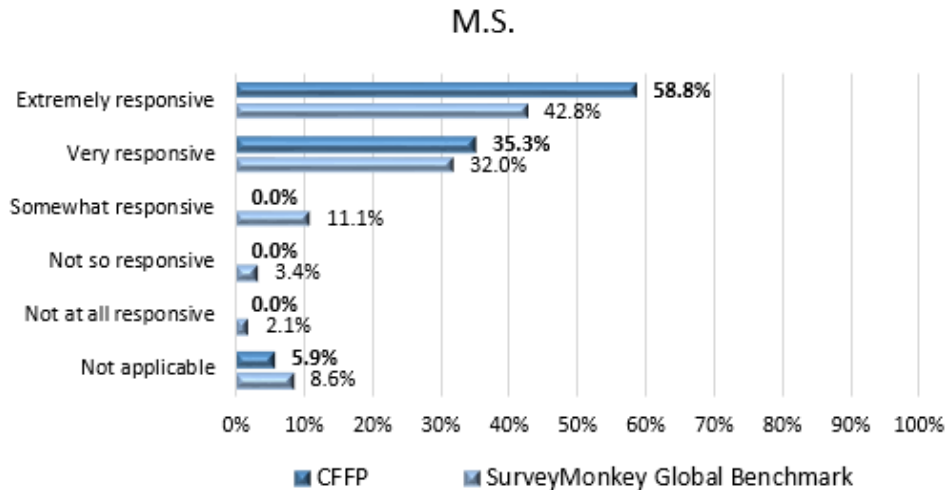


Table 3. Mean customer service helpfulness scores

Item	Fiscal Year	M.S. Mean (SD)	D/CFP Mean (SD)
*How well did our customer service representative answer your question or solve your problem?	FY2018	4.47 (0.72)	4.19 (1.01)

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

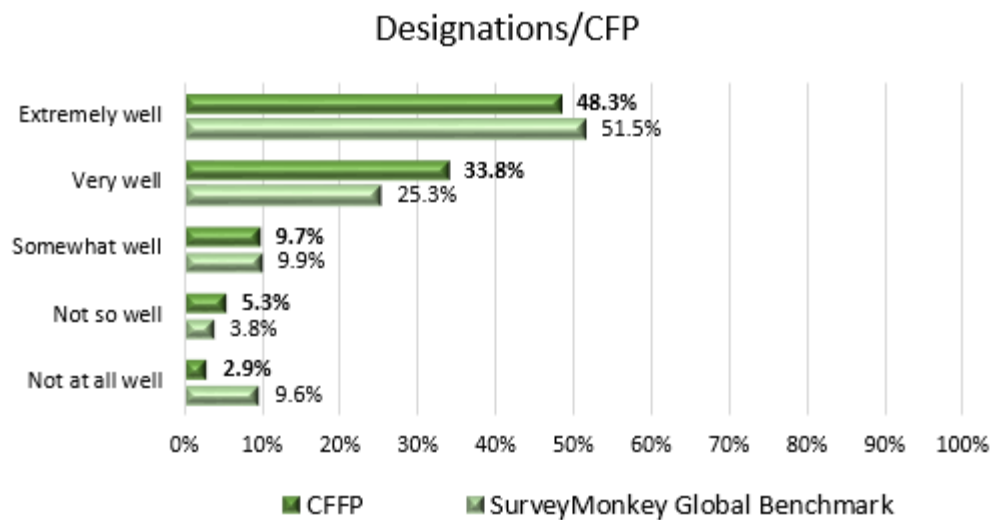
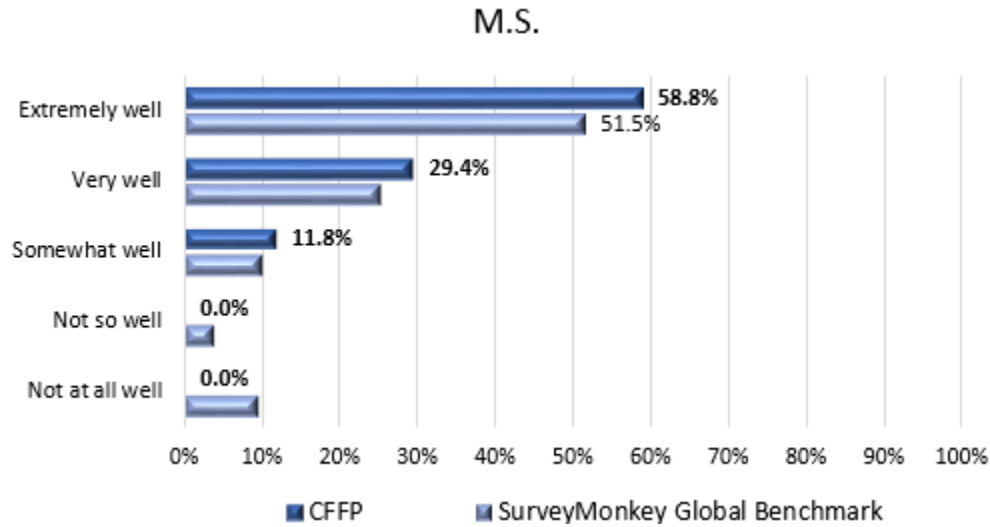


Table 4. Mean customer service overall quality scores

Item	Fiscal Year	M.S. Mean (SD)	D/CFP Mean (SD)
*Overall, how would you rate the quality of your customer service experience?	FY2018	4.82 (0.53)	4.51 (0.94)

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

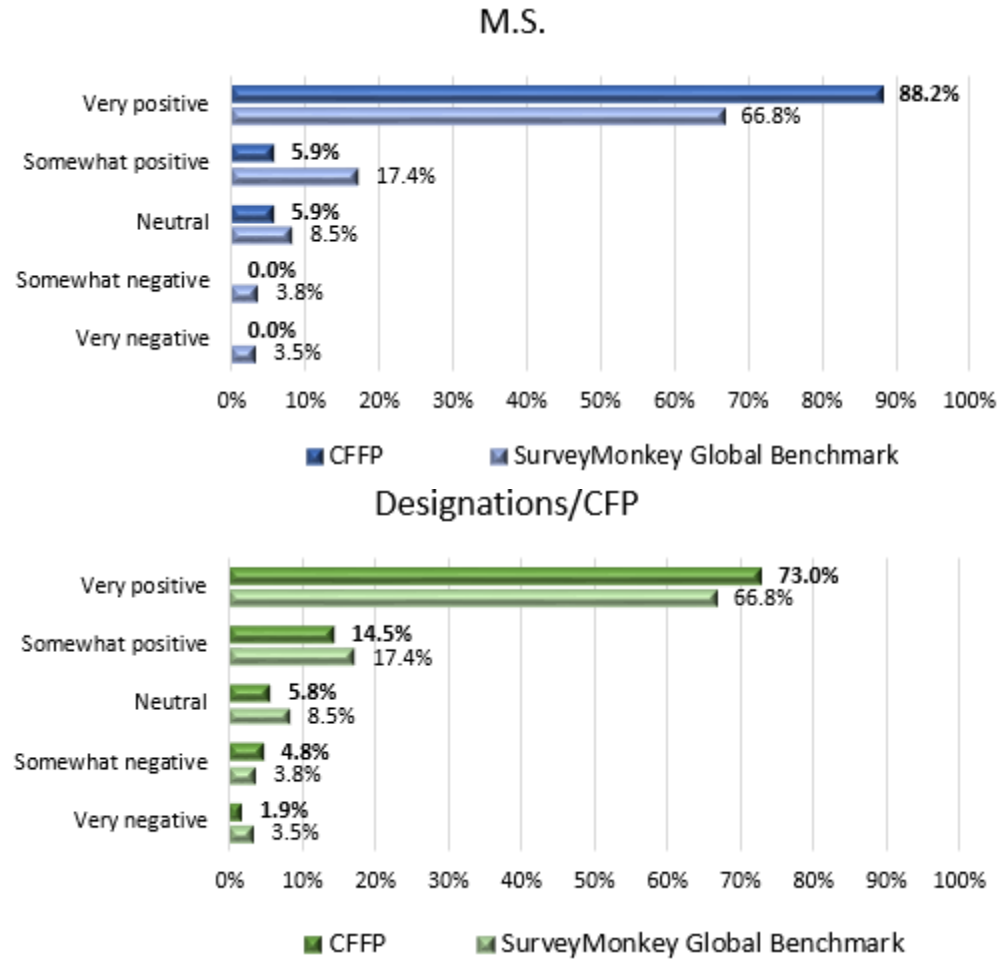


Figure 4. SSC service rating frequencies

Item	Student group	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Not applicable
Prompt service	M.S.	0.0%	0.0%	5.6%	33.3%	61.1%	0.0%
	D/CFP	2.9%	2.4%	6.7%	39.4%	48.6%	0.0%
Adequate assistance	M.S.	0.0%	0.0%	6%	25%	69%	0.0%
	D/CFP	2.5%	5.4%	8.4%	35.5%	48.3%	0.0%
Responsive to questions	M.S.	0.0%	0.0%	0.0%	35.3%	58.8%	5.9%
	D/CFP	1.4%	2.9%	10.1%	39.2%	43.5%	2.9%
Answered question or solved problem	M.S.	0.0%	0.0%	11.8%	29.4%	58.8%	0.0%
	D/CFP	2.9%	5.3%	9.7%	33.8%	48.3%	0.0%
Overall quality of experience.	M.S.	0.0%	0.0%	5.9%	5.9%	88.2%	0.0%
	D/CFP	1.9%	4.8%	5.8%	14.5%	73.0%	0.0%

Advising and Enrollment

Table 5. Advising and enrollment mean scores

Item	Fiscal Year	M.S. Mean (SD)	D/CFP Mean (SD)
My academic advisor listens to my concerns.	FY2018	4.37 (0.60)	NA
	FY2017	4.43 (0.48)	NA
	FY2016	4.67 (0.48)	NA
My academic advisor helps me stay on track in my program.	FY2018	4.39 (0.70)	NA
	FY2017	4.57 (0.76)	NA
	FY2016	4.52 (0.75)	NA
It is easy to register for courses.	FY2018	4.68 (0.57)	4.32 (0.75)
	FY2017	4.56 (0.73)	4.32 (0.78)
	FY2016	4.26 (0.86)	4.17 (0.83)
I receive adequate help from an enrollment specialist when registering for my courses.	FY2018	4.55 (0.74)	4.25 (0.90)
	FY2017	4.31 (1.40)	4.28 (0.87)
	FY2016	4.37 (0.79)	4.06 (0.99)
I know what courses I need to take to complete my degree/program.	FY2018	4.64 (0.58)	4.43 (0.73)
	FY2017	4.69 (0.48)	4.33 (0.84)
	FY2016	4.15 (1.03)	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	M.S.	0.0%	0.0%	5.3%	52.6%	42.1%
	D/CFP	NA	NA	NA	NA	NA
Academic advisor keeps me on track	M.S.	0.0%	0.0%	11.1%	38.9%	50.0%
	D/CFP	NA	NA	NA	NA	NA
It is easy to register for courses	M.S.	0.0%	0.0%	4.5%	22.7%	72.7%
	D/CFP	0.8%	1.5%	8.1%	43.8%	45.8%
Enrollment specialist helpful registering	M.S.	0.0%	0.0%	13.6%	18.2%	68.2%
	D/CFP	1.9%	2.3%	12.7%	35.4%	47.7%
I know what courses I need to take	M.S.	0.0%	0.0%	4.5%	27.3%	68.2%
	D/CFP	1.2%	0.4%	6.2%	38.8%	53.5%

Account assistance

Table 6. Account assistance mean scores

Item	Fiscal Year	M.S. Mean (SD)	D/CFP Mean (SD)
The College makes it convenient to pay my tuition and fees.	FY2018	4.68 (0.48)	4.34 (0.82)
	FY2017	4.69 (0.62)	4.29 (0.86)
	FY2016	4.41 (0.84)	4.26 (0.84)
I receive adequate assistance when paying my tuition and fees.	FY2018	4.64 (0.58)	4.22 (0.84)
	FY2017	4.44 (0.73)	4.08 (0.95)
	FY2016	4.44 (0.75)	4.00 (1.00)
Important information about my account is communicated to me promptly.	FY2018	4.59 (0.67)	4.17 (0.89)
	FY2017	4.19 (1.33)	4.07 (0.92)
	FY2016	4.30 (0.91)	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	M.S	0.0%	0.0%	0.0%	 31.8%	 68.2%
	D/CFP	1.5%	0.4%	 11.9%	 34.6%	 51.5%
Adequate assistance when paying	M.S	0.0%	0.0%	 4.5%	 27.3%	 68.2%
	D/CFP	1.2%	0.0%	 19.6%	 33.8%	 45.4%
Important account information communicated	M.S	0.0%	0.0%	 9.1%	 22.7%	 68.2%
	D/CFP	1.5%	1.9%	 17.3%	 36.2%	 43.1%

University Library

Table 7. University Library mean scores

Item	Fiscal Year	M.S. Mean (SD)	D/CFP Mean (SD)
The online University Library has the materials I need.	FY2018	4.13 (0.62)	NA
	FY2017	4.62 (0.65)	NA
	FY2016	4.14 (0.91)	NA
It is easy for me to retrieve materials from the online University Library.	FY2018	3.37 (1.31)	NA
	FY2017	4.15 (1.07)	NA
	FY2016	3.71 (1.19)	NA

Figure 7. Library rating frequencies

Item	Student group	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
University Library has needed materials	M.S	0.0%	0.0%	12.5%	62.5%	25.0%
	D/CFP	NA	NA	NA	NA	NA
University Library materials easy to retrieve	M.S	6.3%	31.3%	0.0%	43.8%	18.8%
	D/CFP	NA	NA	NA	NA	NA

Technology

Table 8. Technology mean scores

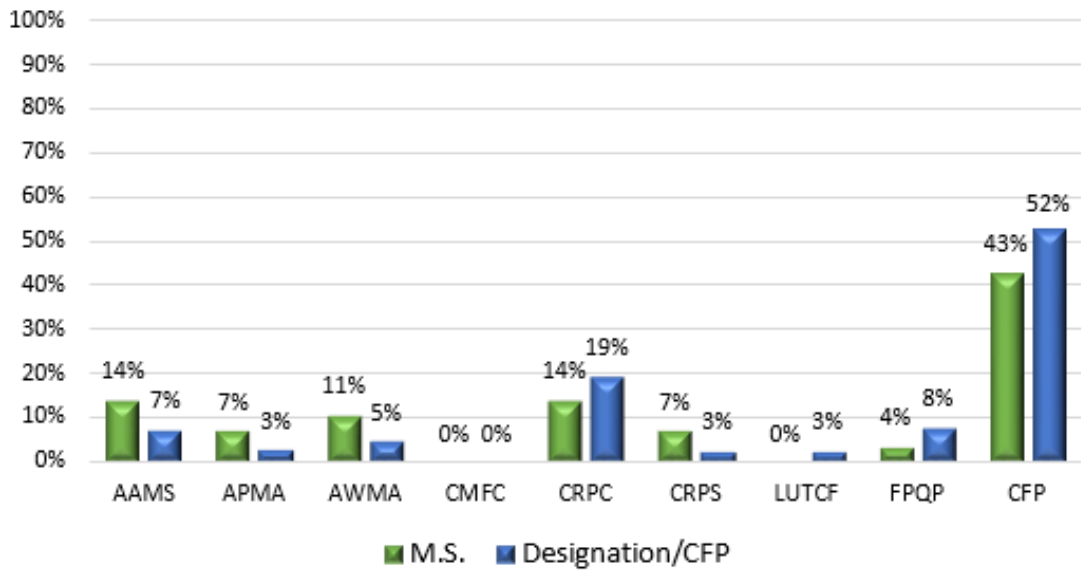
Item	Fiscal Year	M.S. Mean (SD)	D/CFP Mean (SD)
The online learning platform is easy to use.	FY2018	3.55 (0.96)	4.09 (0.93)
	FY2017	4.63 (0.50)	3.70 (0.91)
	FY2016	4.67 (0.73)	3.65 (1.00)
The online learning platform is operational every time I need to use it.	FY2018	4.23 (0.92)	4.05 (1.05)
	FY2017	4.56 (0.51)	3.75 (0.97)
	FY2016	4.44 (0.89)	3.66 (1.04)
I am able to get prompt assistance with technical issues associated with the online learning platform.	FY2018	3.77 (0.81)	3.62 (0.95)
	FY2017	4.00 (0.89)	3.40 (0.83)
	FY2016	3.89 (1.16)	3.37 (0.88)
Technical problems are a constant hassle.	FY2018	2.27 (1.20)	2.21 (1.21)
	FY2017	1.87 (1.15)	2.41 (1.11)
	FY2016	2.52 (1.40)	2.47 (1.10)
I can quickly find what I am looking for on the College website.	FY2018	3.82 (0.66)	3.82 (0.97)
	FY2017	3.81 (1.05)	3.64 (0.97)
	FY2016	4.22 (1.19)	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	M.S	0.0%	18.2%	22.7%	45.5%	13.6%
	D/CFP	1.5%	6.2%	11.2%	43.8%	37.3%
Platform operational	M.S	0.0%	9.1%	4.5%	40.9%	45.5%
	D/CFP	2.7%	9.6%	7.3%	40.4%	40.0%
Able to get prompt assistance with platform	M.S	0.0%	0.0%	45.5%	31.8%	22.7%
	D/CFP	1.9%	3.1%	50.4%	20.0%	24.6%
Technical problems constant hassle	M.S	31.8%	31.8%	18.2%	13.6%	4.5%
	D/CFP	36.2%	28.5%	20.4%	8.1%	6.9%
Quickly find information on College website	M.S	0.0%	0.0%	31.8%	54.5%	13.6%
	D/CFP	1.5%	10.4%	16.9%	46.9%	24.2%

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 Paraplanner Qualified ProfessionalTM

Table 9. Designation and CFP® logistics mean scores

Item	Fiscal Year	M.S. Mean (SD)	D/CFP Mean (SD)
The 6-month testing deadline for my designation program was clearly explained to me when I enrolled.	FY2018	4.54 (0.52)	4.25 (1.02)
	FY2017	3.86 (1.22)	4.27 (1.01)
	FY2016	3.78 (0.97)	3.82 (1.22)
The process for submitting courses for my continuing education (CE) credit was clearly explained when I enrolled.	FY2018	4.00 (1.23)	3.41 (1.21)
	FY2017	3.98 (0.90)	3.39 (1.17)
	FY2016	3.89 (0.93)	3.30 (1.24)
The process to sign up for taking my designation exam at a testing center was clearly explained.	FY2018	4.46 (0.78)	3.74 (1.12)
	FY2017	4.00 (0.82)	3.61 (1.13)
	FY2016	3.89 (0.93)	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	M.S	0.0%	0.0%	0.0%	46.2%	53.8%
	D/CFP	3.4%	6.0%	4.5%	35.1%	51.1%
Process for submitting CE credit clearly explained	M.S	0.0%	15.4%	23.1%	7.7%	53.8%
	D/CFP	8.2%	14.2%	28.0%	27.2%	22.4%
Testing center sign up clearly explained	M.S	0.0%	0.0%	15.4%	23.1%	61.5%
	D/CFP	4.5%	10.1%	22.4%	33.6%	29.5%

Information seeking and complaints

Table 10. Information seeking and complaints mean scores

Item	Fiscal Year	M.S. Mean (SD)	D/CFP Mean (SD)
I get the “run around” when seeking information.	FY2018	1.68 (0.58)	2.10 (1.09)
	FY2017	2.00 (1.20)	2.02 (0.95)
	FY2016	1.96 (0.96)	2.11 (1.05)
When I have a question or problem, I know who to contact.	FY2018	4.29 (0.72)	3.97 (0.92)
	FY2017	3.94 (1.34)	3.82 (1.01)
	FY2016	3.80 (1.16)	3.85 (1.04)
My complaints are handled appropriately.	FY2018	3.69 (0.86)	3.74 (0.94)
	FY2017	3.82 (0.87)	3.49 (0.94)
	FY2016	3.93 (1.00)	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	M.S	31.8%	50.0%	4.5%	0.0%	0.0%	13.6%
	D/CFP	29.3%	34.0%	15.6%	3.5%	5.1%	12.5%
Know who to contact with questions/problems	M.S	0.0%	0.0%	13.6%	40.9%	40.9%	4.5%
	D/CFP	1.2%	6.3%	14.8%	42.2%	27.7%	7.8%
Complaints handled appropriately	M.S	0.0%	0.0%	31.8%	13.6%	13.6%	40.9%
	D/CFP	0.8%	2.7%	23.4%	18.0%	15.6%	39.5%

Impressions of College representatives

Table 11. Impressions of College representative mean scores

Item	Fiscal Year	M.S. Mean (SD)	D/CFP Mean (SD)
College representatives are knowledgeable.	FY2018	4.55 (0.61)	4.23 (0.93)
	FY2017	4.38 (0.89)	4.21 (0.89)
	FY2016	4.16 (0.85)	4.07 (0.89)
College representatives are courteous.	FY2018	4.63 (0.50)	4.45 (0.76)
	FY2017	4.63 (0.81)	4.29 (0.88)
	FY2016	4.40 (0.71)	4.28 (0.82)
College representatives are trustworthy.	FY2018	4.53 (0.61)	4.23 (0.85)
	FY2017	4.44 (0.81)	4.13 (0.91)
	FY2016	4.20 (0.82)	3.97 (0.95)
The separate departments of the College work effectively to serve students' needs.	FY2018	4.10 (0.85)	3.82 (0.94)
	FY2017	4.00 (0.93)	3.72 (0.93)
	FY2016	4.13 (0.87)	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	M.S	0.0%	0.0%	4.5%	31.8%	54.5%	9.1%
	D/CFP	2.3%	2.0%	11.3%	33.2%	43.8%	7.4%
College representatives courteous	M.S	0.0%	0.0%	0.0%	31.8%	54.5%	13.6%
	D/CFP	1.2%	0.8%	5.5%	32.4%	51.6%	8.6%
College representatives trustworthy	M.S	0.0%	0.0%	4.5%	31.8%	50.0%	13.6%
	D/CFP	0.4%	2.3%	14.8%	30.5%	41.0%	10.9%
Separate departments work effectively	M.S	0.0%	0.0%	27.3%	27.3%	36.4%	9.1%
	D/CFP	0.4%	3.5%	27.7%	20.7%	22.7%	25.0%

Overall experience with the College

Table 12. Overall experience with the College mean scores

Item	Fiscal Year	M.S. Mean (SD)	D/CFP Mean (SD)
The College values me as a student.	FY2018	4.14 (0.66)	3.93 (1.02)
	FY2017	4.25 (1.07)	3.76 (1.02)
	FY2016	4.00 (1.00)	3.74 (0.95)
*Overall, how satisfied or dissatisfied are you with the College for Financial Planning?	FY2018	4.73 (0.55)	4.31 (0.96)
	FY2017	4.38 (1.03)	4.04 (1.11)
	FY2016	4.33 (0.87)	3.86 (1.10)

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

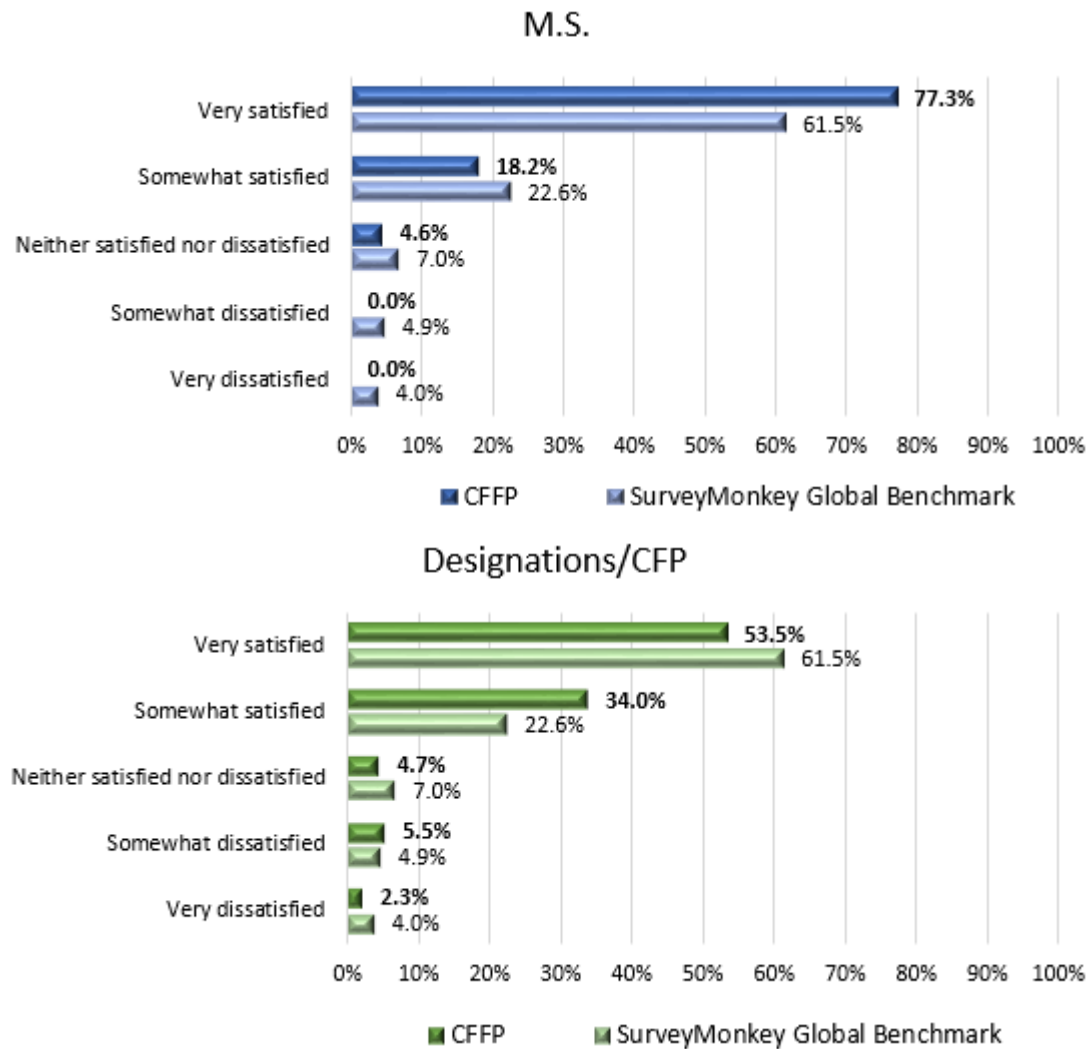


Figure 14. Overall experience with the College rating frequencies

Item	Student group	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Not applicable
College values me as a student	M.S	0.0%	0.0%	12.0%	48.0%	24.0%	4.0%
	D/CFP	2.3%	4.3%	21.9%	28.9%	31.3%	11.3%
Overall, satisfaction with the College	M.S	0.0%	0.0%	4.5%	18.2%	77.3%	0.0%
	D/CFP	2.3%	5.5%	4.7%	34.0%	53.5%	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.

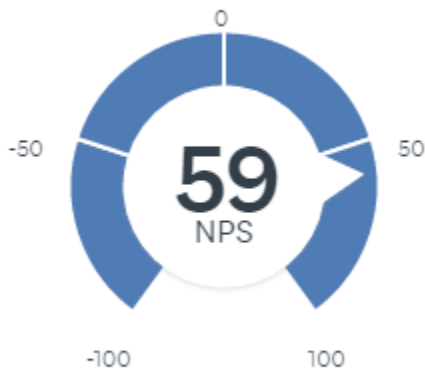
Table 13. Net Promoter Scores

Fiscal Year 2018 results	Detractors (rated 0 to 6)	Passives (rated 7 or 8)	Promoters (rated 9 or 10)	Net Promoter® Score
CFFP (Designation/CFP)	19.1%	36.3%	44.5%	25
CFFP (M.S.)	9.1%	22.7%	68.2%	59
SurveyMonkey Education Sector	21.6%	27.0%	51.5%	30
SurveyMonkey Global Benchmark	30.0%	23.6%	46.4%	16

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

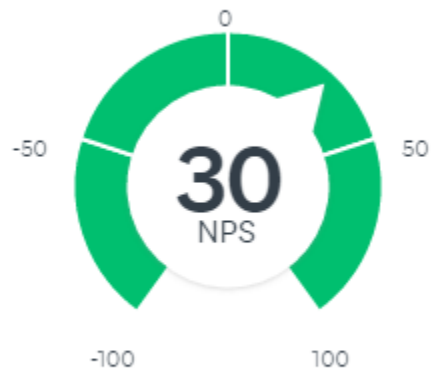
M.S. Programs

Your Net Promoter® Score



Answered: 22 Skipped: 3

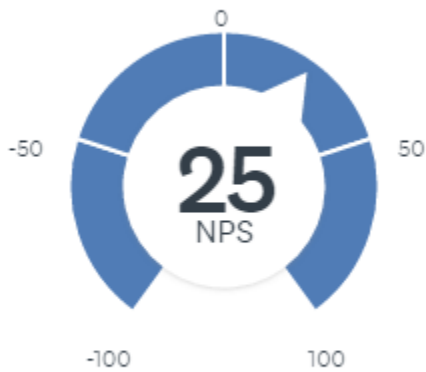
Education ▼



Average from 4,623 Organizations
1/1/2017 - 12/31/2017

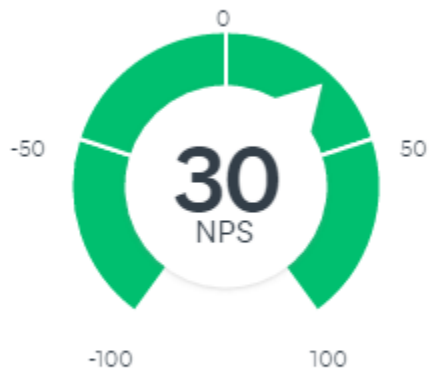
Designation/CFP Programs

Your Net Promoter® Score



Answered: 256 Skipped: 28

Education ▼

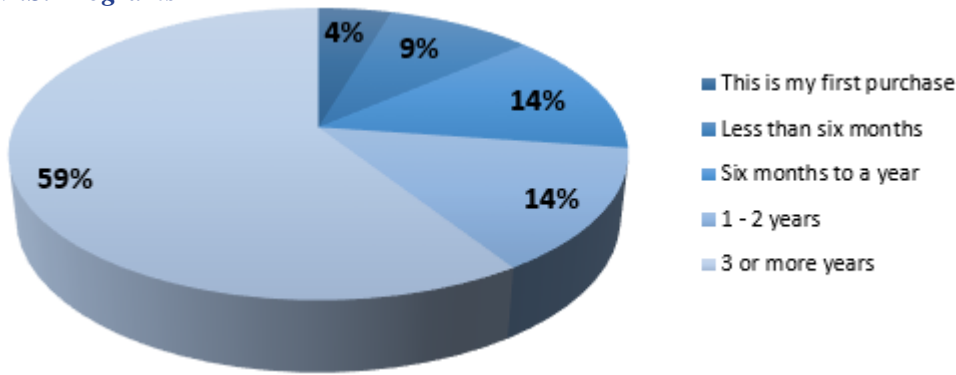


Average from 4,623 Organizations
1/1/2017 - 12/31/2017

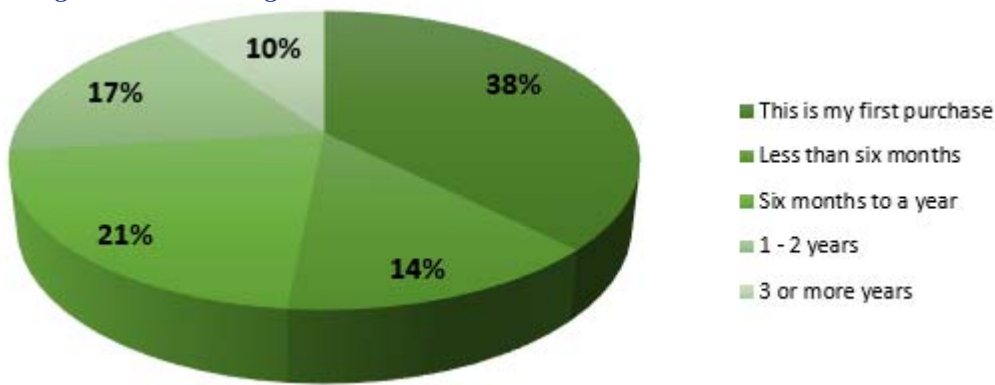
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Figure 16. How long have you been a customer of the College for Financial Planning?

M.S. Programs



Designation/CFP Programs



Conclusions and recommendations

Given the small sample size for the M.S. students and the low response rate for the D/CFP students, results of the survey should be interpreted cautiously. Results indicate that students at the College for Financial Planning are largely satisfied with the College’s services. Respondents indicated that they receive prompt and adequate service when they call the Student Services Center, and open-ended comments generally indicated positive experiences with SSC representatives, although there were a few who noted that SSC staff had treated them rudely or failed to answer their questions. There was one instance in which the rep had left the College and nobody else was assigned to assist the student. A few standardized questions were added this year to get a comparison of the College’s customer service against a global benchmark. Overall, the College had better ratings than the global benchmark in terms of responsiveness, answering questions, and providing a positive experience for the customer.

M.S. students generally agreed that their academic advisor listens to their concerns and helps them stay on track in their program, but those ratings have dropped a bit each year. All students agreed that it was easy to register for courses, they know what courses they need to take to complete their degree/program, and that they receive adequate help from an enrollment specialist when registering for courses. Ratings for those items has increased compared to previous years. Payment of tuition and fees was perceived as being a relatively smooth process, with students agreeing that the College makes it easy to pay tuition and fees, they receive adequate assistance when paying their tuition and fees, and important account information is communicated to them promptly, but a couple of comments were made that the College appears to be too focused on collecting money. Comments about enrollment and related topics were generally positive, although there were a few instances in which students did not feel that information was communicated to them effectively, though there were a fair number of students who did not have contact with Enrollment because it was handled through their company.

About 73% of M.S. students reported using the library to complete assignments. Ratings regarding the University Library improved from FY2016 to FY2017 but dropped back down this year. With the change of control at Apollo, the College was transitioning from using the UOP University Library to setting up its own online library system which likely caused access and navigation issues.

Ratings pertaining to the availability and ease of use of the M.S. online learning platform as well as navigation of the website and technical support have dropped these past few years. Students commented that it is difficult to find what they need and it requires too many clicks. The College moved from using the Pearson online learning platform to the Schoology platform in August of 2016, so some students may have found the previous platform more user friendly. Perhaps the weekly folders within Schoology could be moved up to the home page to eliminate an extra level of clicking. Students in the designation and CFP programs rated all of the items pertaining to technology slightly higher than in previous years, but had several comments that the website is difficult to navigate and appears outdated. A redesigned version of the cffpinfo.com website was made available in November of 2017, so it cannot be determined if students were commenting on the previous website or navigation of the current website. Several students were upset about no longer having access to recordings of their live, online classes and stated that there was no communication made to them about this change occurring. To alleviate complaints, the College should ensure that all changes affecting students are clearly communicated and give an explanation of the reason for the change in terms of how it will benefit the students.

Just over half (56%) of the M.S. respondents had completed a designation or CFP® program with the College. Of those who had, most had completed the CFP® program. For D/CFP students, the most common programs were CFP®, CRPC®, and AAMS®. Students agreed that the six-month testing deadline was clearly explained, but a couple commented that it was not enough time to study and they should not have to pay fees for an extension. D/CFP students did not necessarily agree that CE course submission processes were clearly explained, nor did they necessarily agree that the process to sign up for an exam at a testing center was clearly explained. M.S. students who had taken a designation or CFP program provided higher ratings for both of these items, although given the very small sample size this difference should be interpreted very cautiously. Open-ended comments generally indicated that students were satisfied with their program. However, a few students noted that materials were poorly organized, contained errors, or did not prepare them for the exam. There were a couple of comments that mentioned that it would be useful to have a schedule that assisted students in working through the material within certain time frames or simply having an annual schedule of all the courses made available. The College used to have something for the CFP programs that broke down the module readings into a certain number of weeks for each to give students a general idea as to how long it might take to progress through the program.

When seeking information, students did not feel that they were given the run-around, but were not always sure who to contact when they had a question or problem. Students did not always feel that their complaints were handled appropriately, and ratings were lower for M.S. students than for D/CFP students this year. Students expressed positive views of College representatives, indicating that they were knowledgeable, trustworthy, and courteous. Students also generally felt that the separate departments worked effectively to serve students' needs, although D/CFP student ratings were lower than M.S. student ratings.

Students generally agreed that the College values them as students, but ratings for D/CFP students on this item were lower than ratings for M.S. students. Overall, both groups of students agreed that they are satisfied with their experience with the College. The Net Promoter Score which pertains to a question regarding whether or not a student would recommend the College was 25 from D/CFP students and 59 from M.S. students as compared to a Net Promoter Score of 30 for other combined educational institutions.

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@cffp.edu.

Appendix B: Survey Invitation Email



College for Financial Planning[®]
EDUCATING THE NATION'S TOP FINANCIAL ADVISORSSM

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 2** 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@cffp.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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