

IOWA + qualtrics^{XM}[®]

Presentation and Demonstration

August 27, 2025

Agenda

- **Welcome (5 minutes)**

- Jessica Van Heuveln - Qualtrics CX Program Manager

- **Opening Remarks (20 Minutes)**

- Herb Sutton - DOM Deputy Director/Executive Sponsor
 - Shane Dwyer- State of Iowa Chief Information Security Officer

- **Program Managers' Presentations (50 Minutes)**

- **Qualtrics History with the State of Iowa**

- **What is Qualtrics?**

- **Employee Experience (EX)**

- Sara Kirk - Qualtrics EX Program Manager

- **Customer Experience (CX)**

- Jessica Van Heuveln - Qualtrics CX Program Manager

- **Digital Experience (DX)**

- Natalie Sipes - DX Portfolio Manager

Agenda

- **Capitol Challenge and Break (10 minutes)**
- **Demonstration (60 minutes)**
 - Hunter Markus - Qualtrics Technical Success Manager
- **Get Prepared and Next Steps (10 Minutes)**
 - Jessica Van Heuveln - Qualtrics CX Program Manager
- **Question and Answer Forum (25 Minutes)**
 - Jessica Van Heuveln - Qualtrics CX Program Manager

Please note: This session is being recorded. The final video will be polished and edited for training purposes only. While the Q&A portion will be captured, it will not be publicly shared. Instead, it will be used internally to support team planning and the development of training materials.

Opening Remarks

Herb Sutton & Shane Dwyer

Qualtrics history with the State of Iowa?

Jessica Van Heuveln

Start Recording

Qualtrics' history with the State of Iowa

How Qualtrics has supported a variety of mission-critical use cases for the State of Iowa

May 2020

COVID-19 response

In-person testing ['20-'22]
At-home testing ['21+]

Primary user: Iowa HHS &
Iowa State Hygienics Lab

*Legacy Qualtrics research
use cases
since 2015 (e.g. State
Nursing Board; Youth Risk
Behavior Surveys)*

July 2023

Employee Experience

**Pioneered for HHS
alignment in 2022**

**Expanded for statewide
alignment with DAS in 2023**

Jan 2025

**Enterprise
Customer and Digital
Experience**

**Enterprise VoC, Forms and
Data Analytics platform.**

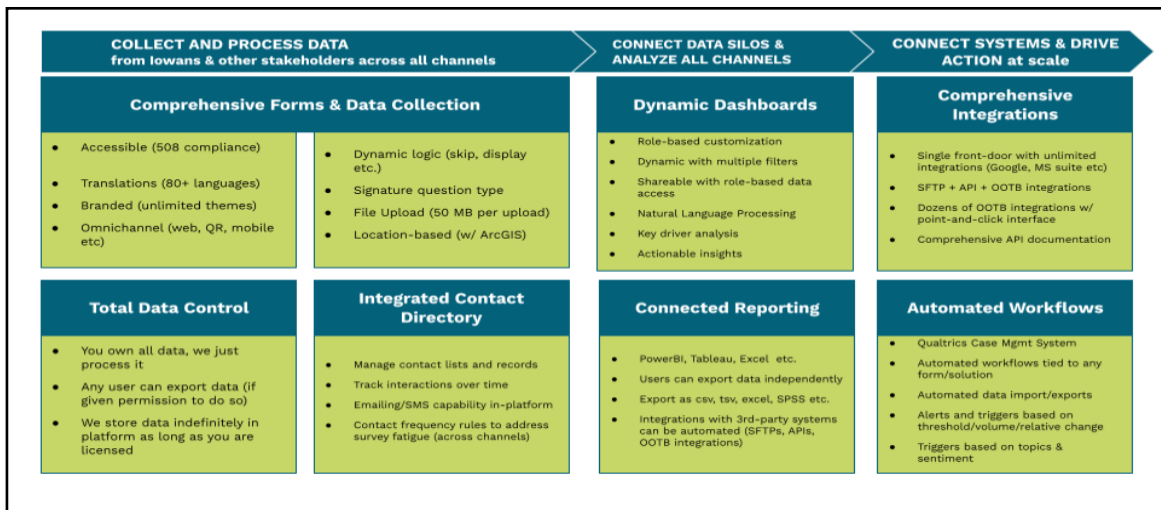
What is Qualtrics?

Jessica Van Heuveln

What is Qualtrics?

Qualtrics is a globally recognized leader in experience management, customer experience, and employee experience. It offers custom solutions, including a Digital Voice of the Customer (VoC) system to capture and analyze feedback, as well as to create and replace forms and workflows. |

<https://www.qualtrics.com/>



Programs

EX

Employee Experience

Program Manager: Sara Kirk

To improve employee engagement across the state through employee feedback and action planning that ultimately leads to a more rewarding work experience.

CX

Customer Experience

Program Manager: Jessica Van Heuveln

Improving the experience of customers and processes when interacting with both internal and external services.

DX

Digital Experience

Program Managers: Jessica Van Heuveln & Natalie Sipes

To improve user experience by analyzing their behavior, feedback, and sentiment on websites and web applications.

Employee Experience (EX)

Sara Kirk

EX What is Employee Experience?

Iowa Employee Experience Program Overview

Candidate Experience

(Launching in Fall 2025)

Continuous feedback from job seekers to help us improve our hiring processes.

Onboarding Survey

(Launching in Fall 2025)

New Employees Post-Hire
- 5 days
- 1 month
- 5 months

Exit Survey

(Launching in Fall 2025)

Exit Surveys will be sent to employees after a separation date is processed in Workday.

Annual Cycle of Employee Listening

Engagement Survey

Measures key engagement areas (leadership, enabling performance, communication, trust, & teamwork).

Annually in July

Pulse Survey

Tracks progress on previously identified focus areas.

Annually in January

By creating a positive and engaging employee experience, the state can foster a motivated, loyal, and highly productive workforce, ultimately driving statewide success.

Program Manager: Sara Kirk

Goals of Employee Listening

Build Trust and Transparency

Sharing survey results and following up with action demonstrates that leadership values employee input which can strengthen trust and promote open communication across the organization.

Improve Engagement

Surveys allow organizations to regularly gather feedback from employees, fostering a sense of inclusion and giving employees a voice in the decision-making process.

Higher Retention

The cost of employee turnover can be substantial. By improving retention rates, we can significantly reduce costs.

Continuous Improvement

Employees who feel valued and supported are more likely to feel like they're able to offer ideas that might challenge existing processes and be likely to offer solutions that lead to improved results.

Support Productivity

Employees require time before they are proficient in their roles. Identifying gaps in the can help them engage in their work and minimize productivity losses.

Survey Dimensions

Leadership

Examines how leaders motivate and guide their teams by providing regular feedback, recognizing contributions, and empowering employees.

Trust & Communication

Focuses on honest and transparent communication from leadership and creating a climate where employees feel safe to voice their ideas and concerns.

Performance

Centers on providing employees with resources, support, and opportunities in their roles to meaningfully contribute and have room to develop their careers.

Inclusion & Well Being

Focuses on fostering a positive, inclusive, and teamwork driven culture that aligns with employee needs; supports safety, cooperation, and overall well being.

Retention

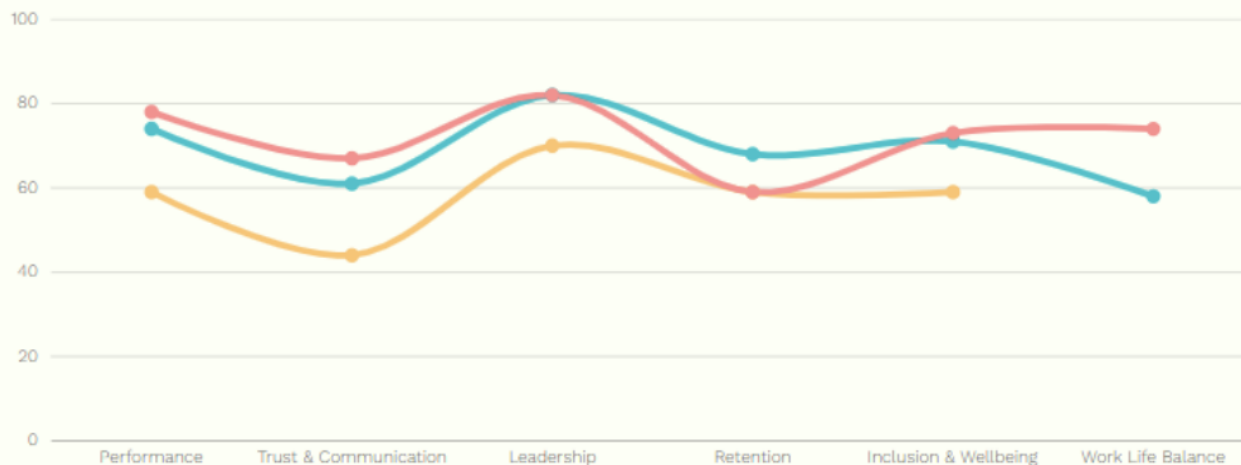
When employees feel connected to their work, their teams, and their agency's mission, they are more likely to stay long-term

Work Life Balance

Addresses the importance of flexibility and the ability to effectively manage their professional responsibilities alongside their personal lives

Engagement Survey Scores

Year-over-Year Comparison



Note: Work Life Balance was not measured in 2023



2023 Survey



2024 Survey



2025 Survey

Employee Experience

- Annual engagement survey – July; Pulse survey – January
- Expansion into Candidate Experience and Lifecycle Program this fall
- Partnership with a network of survey champions; we currently have 42 survey champions across every agency
- Meeting with each agency to give more guided action planning and engagement support
- Collecting and share success stories and best practices to help make improvements across the state

Program Manager: Sara Kirk

Customer Experience (CX)

Jessica Van Heuveln

CX What is Customer Experience?

Feedback Collection:

- **Surveys/Forms:** Create and distribute surveys/forms to gather customer feedback on their experiences.
- **Multi-Channel Feedback:** Collect feedback through various channels, including email, SMS, web, mobile apps, and social media.

Program Manager: Jessica Van Heuveln

The image displays three overlapping screenshots of digital forms, illustrating different customer experience touchpoints:

- Top Screenshot (YOUR LIFE IOWA):** A "Depression Screening" form. It includes a header with the "YOUR LIFE IOWA" logo and "Iowa DHS". The main text explains that depression is a common mental health condition and provides instructions for answering questions. It also offers immediate assistance via phone (855) 581-8111, text (855) 895-8398, or live chat. A "Next >" button is visible in the bottom right corner.
- Bottom Left Screenshot (IOWA):** A "Scheduling Request" form from the "Office of the Governor of Iowa". It is titled "Event Primary Contact" and contains input fields for "First Name", "Last Name", "Phone", and "Email". A progress bar at the bottom shows "0% Survey Completion" to "100%", with a "Next" button.
- Bottom Right Screenshot (ROAD TO RETIREMENT):** A "ROAD TO RETIREMENT" form. It features a blue header with the title and a circular logo. The text describes the tool's purpose in helping users choose a retirement membership group based on age and years in ICRS-covered employment. It includes a dropdown menu for "Membership Group" and a "Next" button.

CX What is Customer Experience?

Advanced Analytics:

- **Text and Sentiment Analysis:** Analyze open-ended feedback to understand customer sentiment and identify common themes.
- **Predictive Analytics:** Use machine learning models to predict customer behavior and outcomes based on historical data.

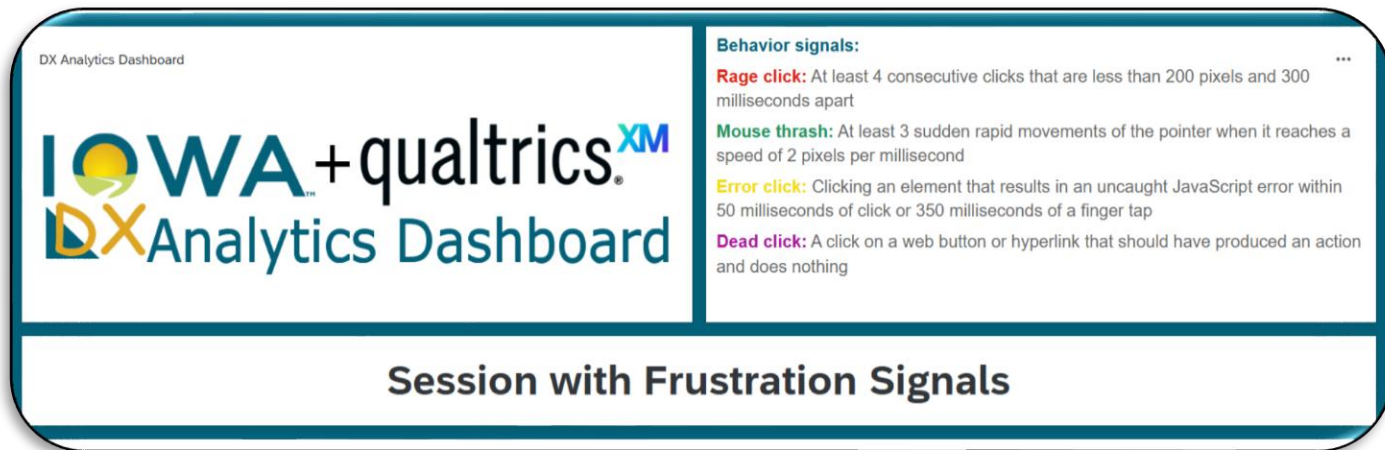


Program Manager: Jessica Van Heuveln

CX What is Customer Experience?

Actionable Insights:

- **Dashboards and Reports:** Visualize customer feedback and key metrics in customizable dashboards and reports.



Program Manager: Jessica Van Heuveln

CX What is Customer Experience?

Closed-Loop Feedback:

- **Follow-Up Actions:** Set up automated workflows to respond to customer feedback in real-time, such as triggering alerts or follow-up actions.
- **Case Management:** Manage and track customer issues to ensure timely resolution.

Quotrix CX Intake - DOC Kim bradfield

Created date: May 16, 2025, 4:11:18 PM

Status: Open | Owner or team: Q IA Support | Priority: Low

Group: Enter the group name

Ticket details

Contact info: DOC, Kim bradfield

File 1: Awards, awards nominations.

Describe: Type of Data: Outcome: Additional Files

Comments

Add a comment

Cancel Submit

Filter view: Q IA Support | Reset filters

18 Tickets not Closed | 18 Tickets Open more than 24 hours | 0 Tickets Open less than 24 hours | 0 SECS Average resolution time (7/26/2025 - 6/12/2025)

Priority	Ticket key	Ticket name	Owner name	Created at	Updated at	Status
Low	T-771	Quotrix CX Intake - Corrections Devin Hansen	Q IA Support	Jun 18, 2025, 7:53 AM	Jun 18, 2025, 7:53 AM	Open
Medium	T-569	Unsatisfied Customer - (PERS)	Jessica Van Heuveln, Q IA Support	Jun 3, 2025, 11:31 AM	Jun 3, 2025, 11:27 AM	Open
Low	T-355	Quotrix CX Intake - HD Laura Akins	Q IA Support	May 22, 2025, 12:14 PM	May 20, 2025, 7:24 AM	Open
Low	T-336	Quotrix CX Intake - DOC Kim bradfield	Q IA Support	May 17, 2025, 1:30 PM	May 16, 2025, 4:11 PM	Open
Low	T-335	Quotrix CX Intake - Iowa Health and Human Services Sarah Jacob	Q IA Support	May 16, 2025, 4:30 PM	May 16, 2025, 4:10 PM	Open
	T-334	Quotrix CX Intake - Department of Corrections District 6 Colin	Q IA Support	May 17, 2025, 1:34 PM	May 16, 2025, 4:10 PM	Open

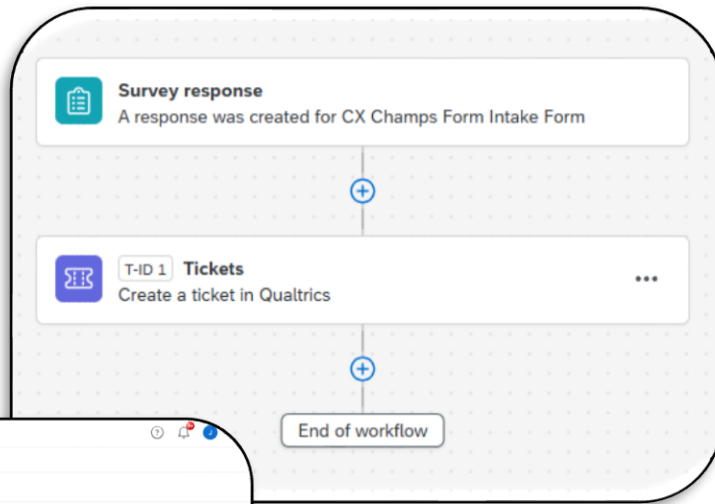
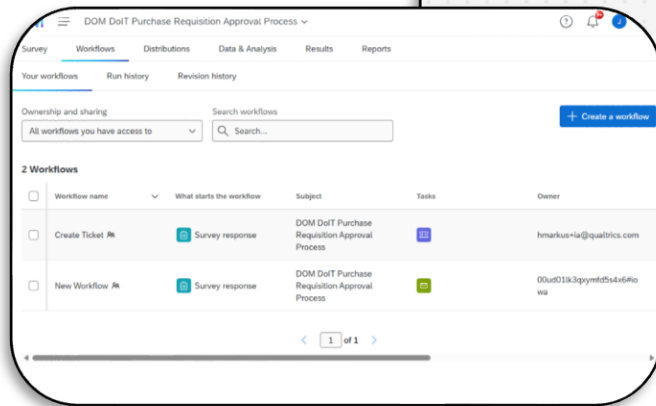
Program Manager: Jessica Van Heuveln



What is Customer Experience?

Integration and Automation:

- **API Integration:** Integrate Qualtrics with other tools and platforms to streamline data collection and analysis.
- **Automated Actions:** Automate routine tasks and workflows to improve efficiency and responsiveness.



Program Manager: Jessica Van Heuveln

What is Customer Experience?

New Survey Taking Experience

Turn on by default:

- **Overall usability:** Modernized user interface of surveys to meet evolving web design standards, as well as the latest AI enhancements, powered by an updated web framework.
- **Mobile-friendly:** Surveys are optimized for taking on mobile, meeting respondents where they are and setting the foundation for the interaction models of the future.
- **Accessibility:** Surveys **meet WCAG 2.1 AA** accessibility standards for key features, the full list of which can be found in [Overview of Improvements](#).

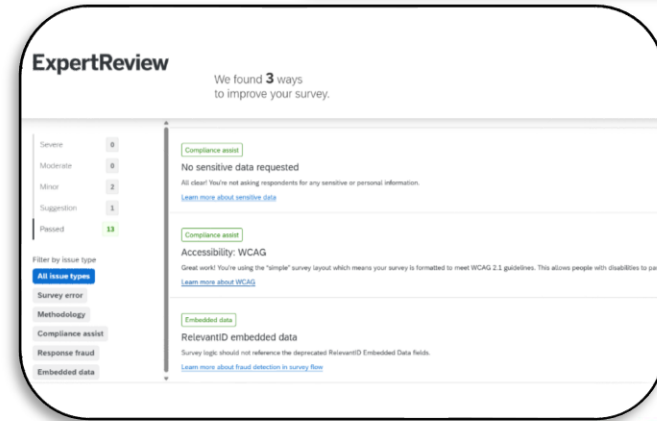
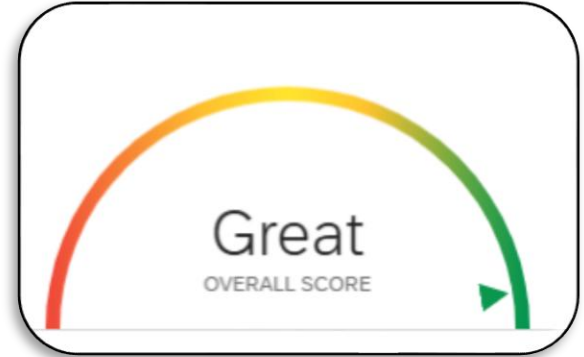
Program Manager: Jessica Van Heuveln

CX What is Customer Experience?

ExpertReview

What does ExpertReview check for?

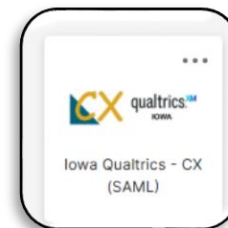
- **Methodology**: Recommended best practices on building your survey to elicit the best data from your respondents.
- **Survey Errors**: A check for common mistakes made during the survey building process that may cause your survey to not function properly.
- **Compliance**: A check to verify that you are complying with WCAG accessibility requirements.
- **Sensitive Data Requests**: Once a [Brand Administrator](#) sets up a [Sensitive Data Policy](#), ExpertReview will flag any sensitive data you are requesting in your survey.



Program Manager: Jessica Van Heuveln

CX Customer Experience

- ✓ **SSO Integration:** Single Sign-On (SSO) connection has been successfully established.
- ✓ **User Roles & Permissions:** User types, roles, and permissions have been clearly defined.
- ✓ **Branding:** Custom themes have been developed for each agency and its attached units, and approved by the DX Steering Committee.



Qualtrics User Types

Participant User	+
Standard User	+
Advanced User	+

A screenshot of a Qualtrics survey. The first question is "Overall, how satisfied are you with this product?" with three radio button options: "Extremely satisfied", "Neither satisfied nor dissatisfied" (which is selected), and "Extremely dissatisfied". The second question is "How would you rate our service in the following categories?" with a scale from "Excellent" to "Average" to "Terrible". The ratings are: Courtesy (Excellent), Professionalism (Average), and Knowledge (Terrible).

	Excellent	Average	Terrible
Courtesy	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Professionalism	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Knowledge	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

CX Customer Experience

Review & Workflow Process: Finalizing the review and approval workflows.

Publish Checklist: Finalizing the checklist to support consistent and successful publishing processes

Program Guide: Nearing completion of the comprehensive Program Guidebook.

Training & Resources: Developing a centralized 'one-stop shop' dashboard to provide easy access to key resources, along with additional supporting materials on the DX Training Site and YouTube channel.

Program Manager: Jessica Van Heuveln

How Do I Publish in Qualtrics?

This process is designed to ensure that projects are secure, well-constructed, and align with the organization's objectives. The review phase examines sensitive information and verifies that the project adheres to our accessibility and branding standards. Agency approval confirms that projects are consistent with the organization's goals and that the information provided is accurate. By utilizing a ticketing system to track everything, we can ensure accountability and prevent any issues with the project.

Build & Edit

User types with edit and creator access can build and modify projects. Refer to the [Understanding User Types in Qualtrics](#) article for detailed access points.

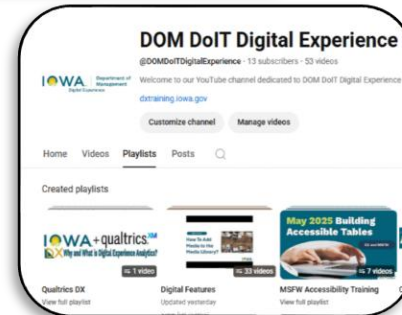
If access is required, a request must be submitted through the intake process outlined in the User Onboarding procedure.

Request

All user types must receive approval before publishing any survey or

IOWA Department of Management The State of Iowa's Qualtrics Program Guidebook

[What is Qualtrics?](#)
[Qualtrics Program Management: EX, CX, & DX Focus Areas](#)
[Qualtrics Governance](#)
[CX Program Governance](#)
[DX Program Governance](#)
[Technical Governance](#)
[Self-Service Model Governance](#)
[Enterprise Governance](#)
[Qualtrics: Driving Engagement Across Iowa](#)
[Engage Studio's Goals and Visions](#)
[Engage Qualtrics' Training And Support](#)
[Engage Qualtrics' Training Opportunities](#)
[Engage Qualtrics' First Class Support](#)



Digital Experience (DX)

Natalie Sipes

What is Digital Experience?

- **Feedback Collection**
- **Behavior Data Analysis**
- **Funnel Tracking**

YouTube Chapters

- [Why Digital Experience Analytics?](#)
- [What is Digital Experience?](#)

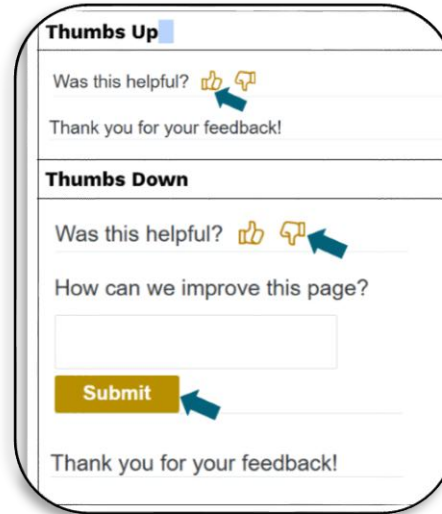


Program Manager: Natalie Sipes

DX What is Digital Experience?

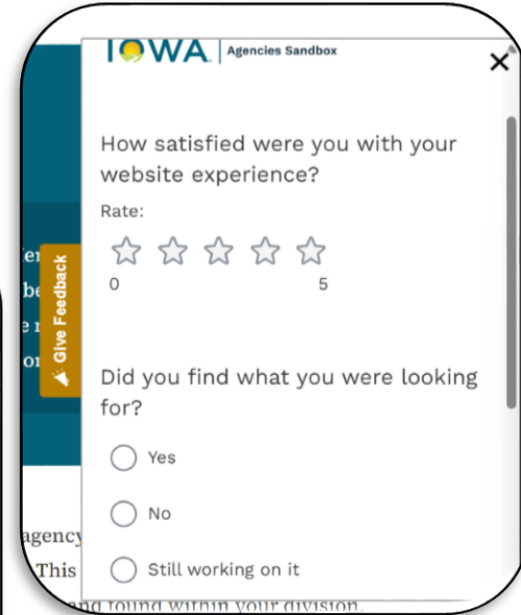
Feedback Collection:

- **Surveys and Forms:** Create and distribute surveys to gather feedback from users about their digital interactions.
- **Website and App Feedback:** Embed feedback widgets directly into your website or mobile app to capture user insights in real-time.



This widget is titled "Thumbs Up" and "Thumbs Down". It contains two sections. The "Thumbs Up" section asks "Was this helpful?" with thumbs up and down icons, followed by "Thank you for your feedback!". The "Thumbs Down" section asks "Was this helpful?" with thumbs up and down icons, followed by "How can we improve this page?" with a text input field, a "Submit" button, and "Thank you for your feedback!". Blue arrows point to the thumbs down icon in the "Thumbs Up" section and the "Submit" button in the "Thumbs Down" section.

Thumbs Up and
Thumbs Down



This is a feedback form titled "IOWA Agencies Sandbox". It asks "How satisfied were you with your website experience?" with a "Rate:" label and a star rating from 0 to 5. Below this, it asks "Did you find what you were looking for?" with radio button options for "Yes", "No", and "Still working on it". A blue arrow points to the "Give Feedback" button on the left side of the form.

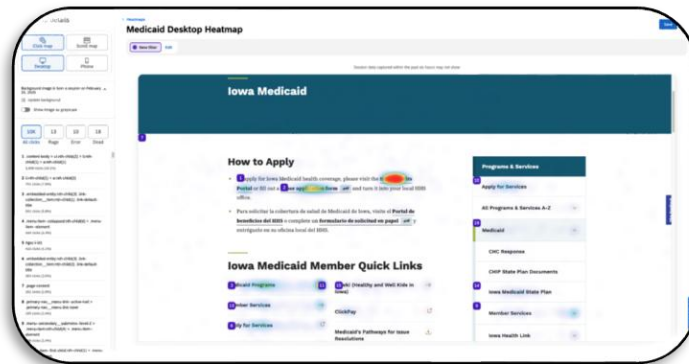
Feedback Tab

Program Manager: Natalie Sipes

What is Digital Experience?

Behavioral Data Analysis:

- **Session Recording:** Record user sessions to see how they navigate your digital platforms, identifying pain points and areas for improvement.
- **Heatmaps:** Visualize where users click, scroll, and spend the most time on your site or app.



Behavioral Indicators



Mouse Thrashing



Rage Clicking



Error Clicks



Dead Links



Session Replay

Program Manager: Natalie Sipes

What is Digital Experience?

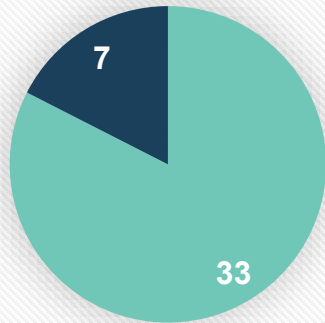
Funnel Tracking:

- **Event Tracking:** Monitor specific actions users take on your website, such as clicks, form submissions, and page views.



Program Manager: Natalie Sipes

DX Websites



■ Launched ■ Remaining

Feedback Tab

Thumbs Up and Thumbs Down

[Digital Experience Analytics](#)

Program Manager: Natalie Sipes

- **What's Next?**

- **September 5, 2025**

- Launch remaining 7 sites

- **September 18, 2025**

- Training for Agency Managers

- **October 2, 2025**

- DX Steering Committee Decision-Making on Executive and Agency-Level Dashboards.

Capitol Challenge and Break

Capitol Challenge
[Take the survey](#)



10:00

Demonstration

Hunter Markus

The Qualtrics XM Platform

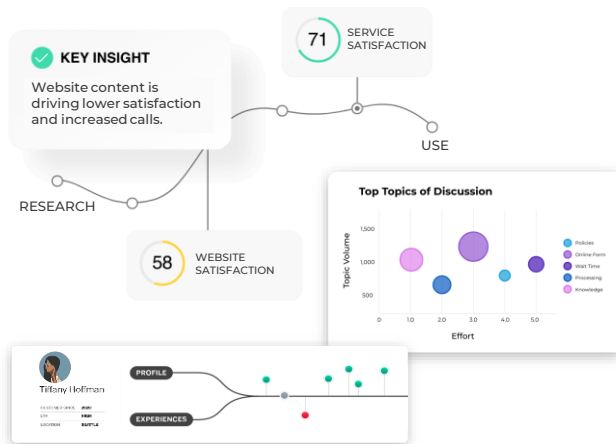
LISTEN

Continuously capture user feedback through **solicited**, **unsolicited**, and **behavioral** insights



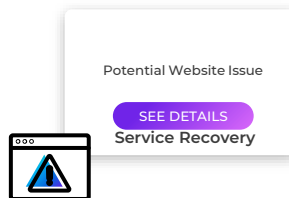
UNDERSTAND

Aggregated insights surfaced through role-based dashboards and analysis tools

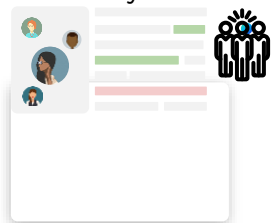


ACT

Strategic **workflows** and integrations



Ongoing AI-driven **human centered design** cycles.



Get Prepared and Next Steps

Jessica Van Heuveln

- ✓ Begin exploring resources related to Qualtrics.
 - [Understanding Qualtrics](#)
 - [Getting Started with Surveys](#)
 - [Getting started with CX Dashboards](#)
- ✓ Plan your project(s) and discover your business requirements.
 - [Benefits, Tips, Best Practices, and Free Survey Tool](#)
- ✓ Start the process and obtain internal intake approval when necessary.

CX/DX Next Steps

- Early next week, a follow-up email from GovDelivery will be sent to all participants, including a survey, recording, and additional items.
- In September, DOM Leadership will send an email to all directors and deputy directors to provide an update and each agency will assign a designated agency approver(s).
- In September and October, we will finalize the DX launch and the initiative to deliver the dashboards requested by IGOV.
- Large-scale launch of Qualtrics CX in October.

Program Manager: Jessica Van Heuveln

Question and Answer Forum

Jessica Van Heuveln