**+**

# User QuickStart Guide:
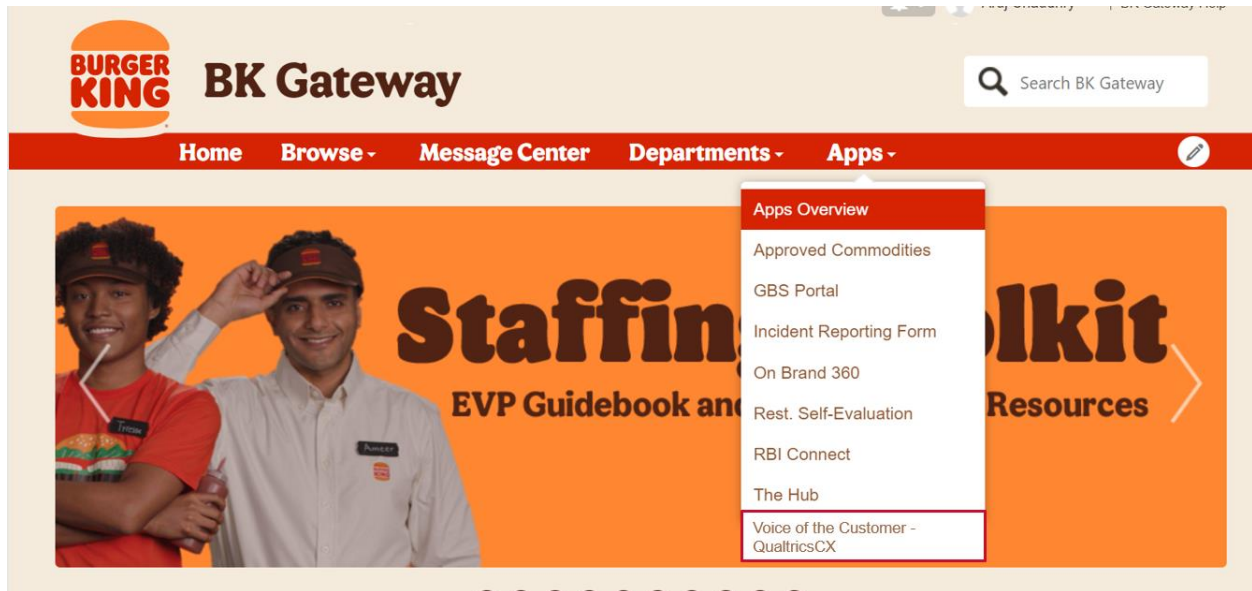# Using Qualtrics for the Guest Trac Program

This document is used to provide a guide to users who will be viewing dashboards and actioning tickets (aka responding to cases) triggered from Guest feedback.

## In this guide

## Accessing Qualtrics

Go to BK Gateway > Apps and select "GuestTrac-Qualtrics" OR navigate directly to
https://rbixm.qualtrics.com/.

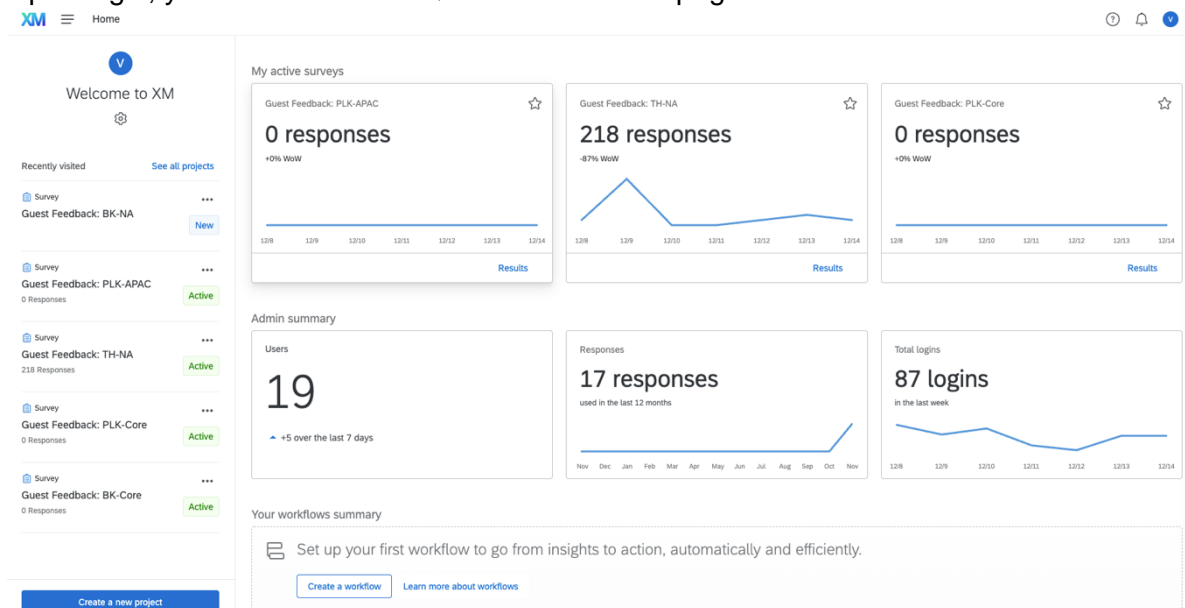

You will be automatically logged in if you have an active single sign-on (SSO) session on your device, otherwise, you will see your SSO login screen (OKTA).
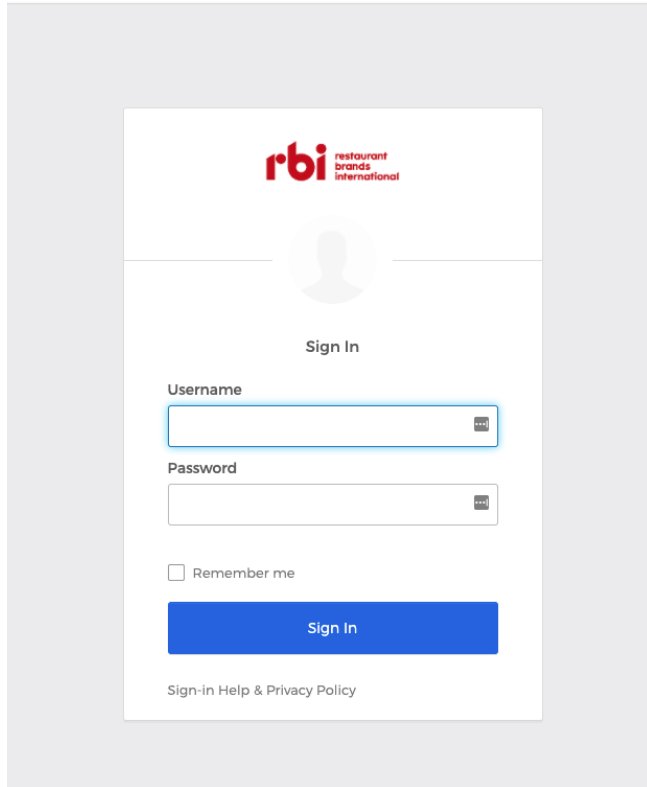
Upon login, you should see the Qualtrics XM home page.



The homepage consists of items, or cards, that provide a snapshot of the content within your account. From the homepage you can view active notifications and most recent projects.

# Dashboards

## Levels of access

The following roles in FRUM will be provided access to view and export dashboards based on the restaurant(s) within their own FRUM hierarchy:

- Reporting Operator
- Reporting Administrator
- Training Platforms Administrator
- Vice-President of Operations
- Director of Operations
- Multi-Unit Manager
- Training Manager
- Restaurant Manager
- Assistant Manager
- Shift Lead

## Accessing dashboards

From anywhere in Qualtrics, you should see this menu icon(≡) in the top left corner of the page

Click on the menu icon and select 'Projects'
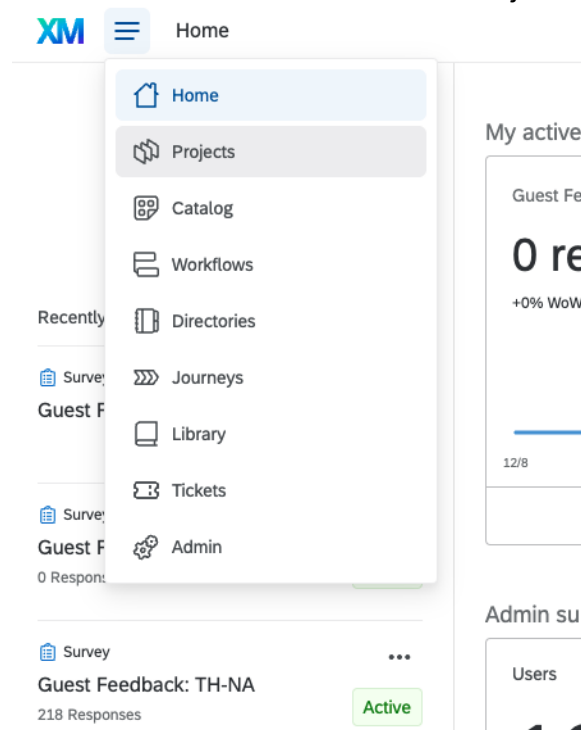


On the projects page, select '🖼️BK Dashboard.'

## Key dashboard components

Once you are in the dashboard, you will find pages listed on the left of the screen that you have access to. Depending on your role, you will be able to view data for a single restaurant or multiple restaurants.
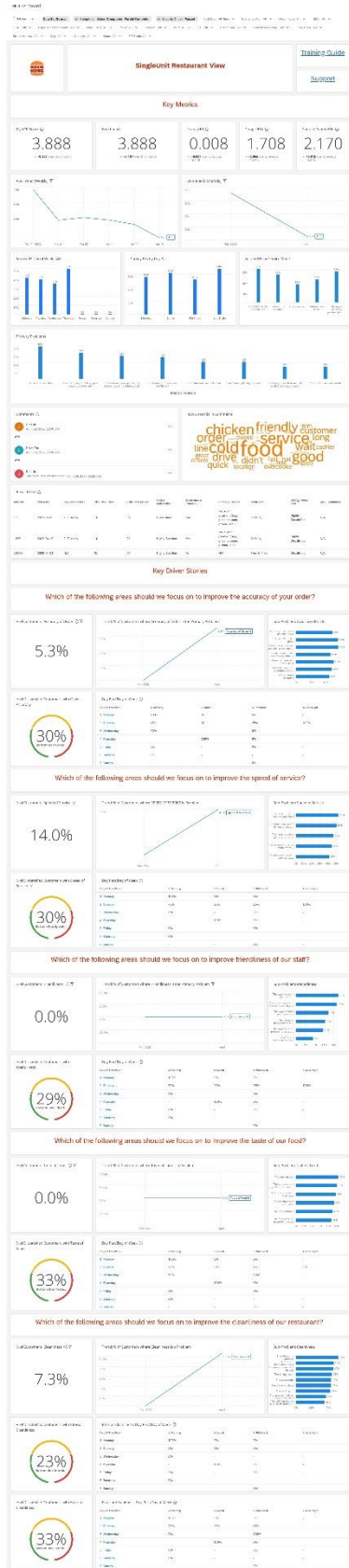
Widgets dynamically present data in graphs, charts, and tables. You can expect to find the following types of widgets in your dashboard.

- Key Metrics
    - ACR, Total Responses, and ACR Trend (Weekly)
- Key Drivers
    - Drivers (e.g. Accuracy, speed of service, friendliness)
    - ACR/Drivers based on Order Type (Carry-Out or Dine-In)
    - Overall Experience Satisfaction
    - Overall Product Satisfaction
    - Tell Us How We Could Have Improved - Verbatim responses
    - Not Satisfied w/ Item Comments - Verbatim responses
    - Key Driver Analysis
- Key Problems Breakdown
    - 'Did you experience a problem?' chart
    - Breakdown: Key Problems
    - Satisfied with Problem Resolution
    - Sub-Problem: Accuracy
    - Sub-Problem: Friendliness
    - Sub-Problem: Speed of Service
    - Sub-Problem: Cleanliness
    - Sub-Problem: Taste of Food
- Text Analysis
    - How could we have improved this experience? (Word Cloud)
- Ticket (aka Case) Management

## Reporting

⚠ For those familiar with the custom report builder function in SMG, please note that reports in Qualtrics are essentially dashboards. Reports will be added over time. As of January 2022, the 3 following reports are available. You will be able to access and export other key information/metrics (as mentioned above), for a certain period, directly from other dashboard pages.

On the projects page, select '📊RBI Reports' > 'BK Reports.'

### Period end report

Quick snapshot of metrics that can be downloaded and printed on a monthly basis, that uses the past 3 months of data. On this page, you will find:
- ACR (Key Metric)
- Trends
- Key Problems
- Focus Areas

### Comments report

Guest complaints or compliments. On this page, you will find:
- Guest complaints and compliments broken out by day part
- List of complaints or compliments

*Key problems report*

This report will provide a clear focus on primary problems that survey respondents experienced, and with it an idea of what to prioritize.

## Filtering the dashboard

When you land on the dashboard, it will automatically be filtered to your store(s). Any filters that you have access to change will be clickable. Those you cannot change will be locked, recognizable by a dark grey background.
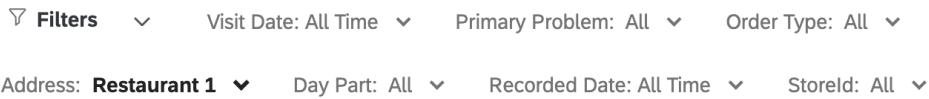


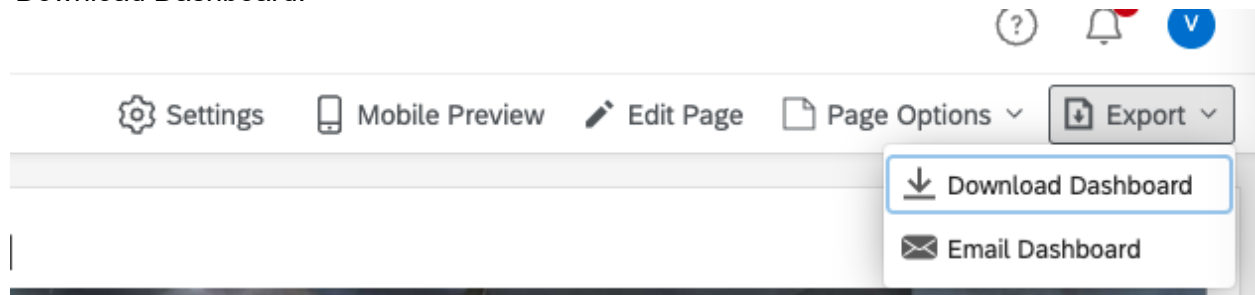Learn more about [Filtering CX Dashboards](#)

## Exporting data

From the dashboard, you can download data for the entire page or per "widget". A Widget is any box you see on the screen.

To export a page, click on the Export button in the upper-right corner of the screen and select 'Download Dashboard.'



On the dialogue box that appears, you may select your file type and set other export options.

## Export Options

| | |
|---|---|
| File Type | PDF ⌄ |
| No page breaks | ☐ |
| Paper Size | Letter (8.5" x 11") ⌄ |
| Orientation | Portrait ⌄ |
| Margin | 0.25in ⌄ |
| Select pages | Executive summary ⌄ |
| Zoom | 100% ⌄ |
| Hide Filters | ☐ |
| Hide Header | ☐ |
| Hide Page List | ☐ |

Close **Export**

To export a widget, navigate to that widget and click on the down arrow icon on the upper-right corner.

Number of responses ⬇

# 3,247

**No change** over previous week

On the dialogue box that appears, you may select your file type and set other export options.

## Export Options

File Type JPG ⌄

✓ JPG

PDF

CSV

TSV

Export

# Tickets aka Case Management - responding to Guest feedback

⚠ In Qualtrics, Case Management is referred to as Tickets or Ticketing.

## Ticket (aka case) creation

A ticket may be created one of two ways:

1. When a Guest indicates through survey response that they were dissatisfied and/or had a problem during their experience at your restaurant, and they would like to be contacted, a ticket will automatically be created, assigned to someone to resolve, and status set to open.
2. When a Guest calls or emails Guest Relations with an issue, that issue will be logged and sent over to Qualtrics. If the issue was resolved, the status will be set to closed when it appears in Qualtrics and is solely for visibility. If the issue was not resolvable by the Guest Relations Agents, it will appear in Qualtrics with a status of open.

## Ticket (aka case) alerts

All open tickets will be assigned to a respective restaurant. If you are assigned a ticket, you will receive a notification through email.

From: **Qualtrics Survey Software** <noreply@qemailserver.com>
Date: Thu, Apr 14, 2022 at 9:23 AM
Subject: Store 000000 :Level 3 -PROBLEM - CLEANLINESS/CONDITION/ATMOSPHERE
To: <mschafer@qualtrics.com>

Case ID: T-227

Date of Contact: Thu, 07 Apr 2022 01:18:01 GMT

**Report Details:** Call Center Feedback - Does not Impact OSAT

- Restaurant: 000000 - 123 testStore St Seattle, WA 98144
- Visit Date: Thu, 07 Apr 2022 01:18:01 GMT
- Issue: PROBLEM - CLEANLINESS/CONDITION/ATMOSPHERE
- Products: ["Fries"]
- Guest Comment: My order was incorrect
- Agent Notes: test ticket

**Guest Details:**

- Name: Alex Smith
- Phone Number: 555-555-5555
- Email: mschafer@qualtrics.com

You can review the detailed Case here. if you're not directed automatically, please access the Case Management tool in Qualtrics via Okta.

*Sample notification – yours may look slightly different*

If you have any questions or concerns about the case, please forward the case alert to your Operations Partner (OP) or Franchise Business Partner (FBP) with the details of your inquiry or issue.
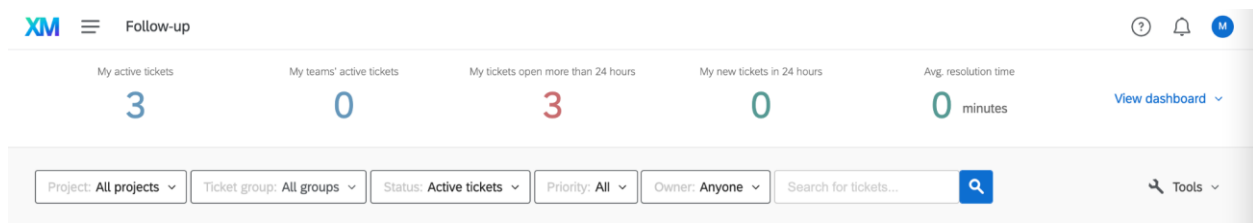
## Ticket (aka case) accessing

### Accessing a ticket assigned to you

There are two ways to navigate to a Qualtrics ticket assigned to you:

1.  Click on the *Open Ticket* button in the email you will receive when a ticket is assigned to you.
2.  Login to your Qualtrics account and select *Tickets* from the dropdown in the top right-hand corner. This will take you to the Ticketing page that is by default filtered to tickets assigned to you.
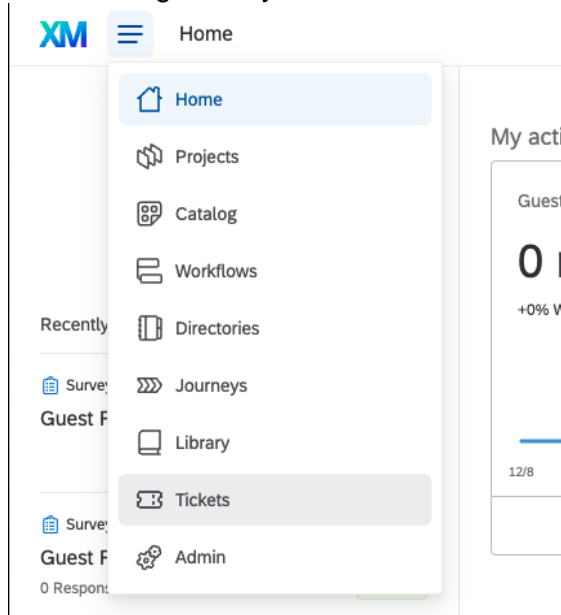


## Accessing a ticket (aka case) assigned to someone else in your group

Login to your Qualtrics account and select *Tickets* from the dropdown in the top right corner. This will take you to the Ticketing page that is by default filtered to tickets assigned to you. You will need to filter by your applicable group and switch the owner to *Anyone*.



## Ticket (aka case) actioning

Once the ticket has been created and accessed within Qualtrics, it can be reassigned or actioned.
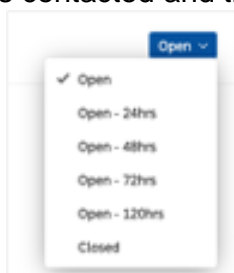
## Reassigning a ticket (aka case)

You can change who the ticket is assigned to by clicking on *Assign To*, typing the full name of a user or team within your group, and pressing *Enter* on your keyboard.

## Ticket (case) status

In the top-right, you can change the status of the ticket. *Closed* indicates that a case is no longer active, because the guest was contacted and their issue was resolved.



## Root cause

Root cause is a field that can be used to trace the source of a ticket's (aka case's) issue. You will be able to choose from a set of options based on the level of the ticket (aka case). Selecting a root cause is required before closing a ticket (aka case).



## Follow up details – Issue type tag

Follow up details are additional questions the ticket owner needs to answer about their ticket, specifically pertaining to their follow up interaction with the Guest.

Tickets (aka cases) created via a survey will be untagged to start, whereas those created via Guest Relations will be pre-tagged with the available information. You may include further tags.

## Ticket data

Scrolling down, you can view any ticket data attached to your ticket in this section. Ticket data are important fields pertaining to the Guest's response, their contact information, and additional store data.



*Sample ticket – yours may look slightly different*

## Viewing additional data

If you want to see more information than what's in the ticket data, there are two options below. Both are located directly below the Ticket Data.



1. Clicking on *Show Full Record* shows the full survey response that was completed by the respondent, except for the embedded data.
2. *Show Embedded Data* allows you to see all embedded data captured in the response.

## Activity

The Activity section of a ticket includes any change that might have been made to the ticket. It includes emails sent, comments made, changes to status, priority, assignment, or root cause, and the user who made each change.

## Closing a ticket (resolving a case)

Once you've closed the loop with the Guest and are ready to resolve the case, add the details of the resolution, then update the status to closed.

Restaurants can close a case two ways:

1. Call the Guest to discuss their experience following the BLAST. Believe, Listen, Apologize, Satisfy and Thank. If necessary, provide the Guest an offer to Make it Right, and invite them back to your restaurant.
   a. If the Guest does not answer the phone, a voicemail should be left if available including:
      i. Your name
      ii. Purpose of your call
      iii. Contact information for the Guest to call you back at a time convenient for them
   b. If the Guest does not have voicemail, make a minimum of two additional attempts to contact the Guest. The date and time of each attempt should be noted in the ticket (case).
   c. After the third attempt, close the ticket (case) with notes. If the Guest returns your call after the ticket (case) is closed, ensure you enter these notes into the system to keep a record of all communications.
2. Closing the ticket (case) with NO CONTACT made. Restaurants can add their notes to the case explaining why the Guest didn't receive follow up from the location. *Example: the Guest is known to the restaurant, or the issue was resolved in person at the time of the incident.*

# Frequently Asked Questions

**Q: How do I log into Qualtrics?**
A: Refer to [this section](#) on accessing Qualtrics

**Q: What do I do if I've lost my password?**
A: You should not require a password to log in. Please ensure you are using single sign-on (OKTA).

**Q: How can I create a new account?**
A: This is done through Franchise Restaurant User Management (FRUM). Reporting Administrators can create new accounts in FRUM and align them correctly within the hierarchy. After this, the new user will be able to log in through the OKTA single sign-on.

**Q: How do I add or remove people from receiving ticket (aka case) notifications?**
A: Ticket (aka case) notifications are sent using the contact information and restaurant hierarchy in FRUM. If case notifications are being sent to users that do not match your FRUM alignment, reach out to your Operations Partner with the notification and correct alignment according to FRUM.

**Q: Can you add this store into Qualtrics?**
A: Franchisees can check Restaurant Attribute Management (RAM) to see the status of each restaurant. Restaurants marked as open in RAM and therefore the Master Data System (MDS) are automatically added to Qualtrics. For requests to add a new store or to change a status to 'Open', please reach out to your field and development team representative.

**Q: How often is Qualtrics updating data from FRUM/RAM?**
A: RBI IT sends Qualtrics this data daily at 10:45 PM EST, containing data for the previous business date

**Q: What happens if a ticket (aka case) isn't closed within 48 hours?**
A: Burger King's Brand Standard is that all tickets (aka cases) are closed in these first 48 hours and reminders begin to be sent to your field team and franchisee leadership. Level 3 tickets (aka cases) remind franchisees and AOMs when tickets (aka cases) hit 48 hours and notify Franchise Business Partners when cases reach 72 hours.

**Q: How are tickets (aka cases) received and processed by Sutherland being categorized and prioritized within Qualtrics?**
A: Agents will determine each ticket's (aka case's) level by applying qualifying Issues from the approved Category Tree:
- Level 1 = Emergency issues such as Injuries, Criminal Activity etc.
- Level 2 = Escalations such as Repeat Callers, Guest Observation of Employee Health & Safety etc.
- Level 3 = Problems encompassing general complaints about Service, Food, Cleanliness, location policies
- Level 4 = Requests & Suggestions related to Nutrition Information, Donations, Store Information etc.
- Level 5 = Praise related to all complimentary feedback

**Q: What kinds of things will Sutherland Contact Center Agents be resolving with my Guests?**
A: Sutherland Global Services (SGS) agents will help resolve as many of the typical, everyday complaints that occur at your locations, "Level 3" issues, as they can. They will also help Guests with requests and suggestions (Level 4) as well as accept praise (Level 5) provided by your Guest and forward that along to your restaurant.

**Q: Will SGS Agents be offering my Guests any kind of compensation for a poor experience?**
A: Sutherland Global Services (SGS) agents will always try to resolve a Guest's issue with a sincere apology first. If the Guest does not feel that an apology is sufficient, the agent has the option to offer Royal Perks Crowns, a coupon, or in limited cases an eGift Card to Guests that experienced an eligible "Level 3" issue. These compensation levels are always preceded by a fraud check and order history review of the Guest's account.

**Q: What kinds of issues will I need to resolve (what issues are SGS Agents not resolving on my behalf)?**
A: Resolution responsibilities for any tickets (aka cases) processed as Open are dependent on your level of management and oversight. Level 1 and 2 cases will always be processed as Open by SGS Agents, as well as any tickets (aka cases) that the Guest insists to be contacted by the location.

**Q: Will I be notified when a ticket (aka case) has been received that I need to be aware of?**
A: Yes, the restaurant, MUM, Director of Ops, VP of Ops, and Franchise Owner email addresses in FRUM will receive an email notification when a ticket (aka case) applicable to the restaurants that you oversee is received that requires your attention or action. If a Sutherland Agent takes care of the Guest's needs, then you will receive an email notification with a closed resolution status. You will also be able to see ALL open and closed cases for your location in the Qualtrics platform. OPs and FBPs will also receive notifications when the Guest provides a service compliment so you can celebrate the success with your restaurant.

**Q: What can be done if the ticket (aka case) is assigned to the wrong location or isn't related to a service experience?**
A: If you identify the wrong location was selected for the case, by speaking with the Guest, please try to close out with the Guest so they do not require further follow up. After speaking with the guest OR when you notice a case has been assigned to the wrong location, you can submit a case to Qualtrics Support via the [Support Survey](). This process should also be followed for tickets (aka cases) that are related to digital, corporate policy, pricing, or brand feedback that need to be removed from your restaurant.

**Q: How can I block someone from submitting feedback for my restaurant? (Why am I receiving complaints from someone who has been blocked?)**
A: If you have a Guest that was previously blocked but is now able to submit feedback again, please contact your OP or FBP to relay the ticket (aka case) ID and Guest contact information. We will work to have the feedback updated. Please note, blocking a Guest from offering feedback must be approved by your OP or FBP.

**Q: What if I receive Guest feedback concerning the mobile app?**

A: If you have received a case that requires Guest follow-up but concerns a technical matter within the app (unrelated to an issue with order accuracy or product standards), please share the case alert email with your OP or FBP, so it can be redirected. If you have a Guest in your restaurant asking for assistance, please direct them to the contact us section of the restaurant website where they can submit a technical support ticket.

# How to get support

⚠ Please check the above FAQs for the most common issues.

Please submit [this support survey](#) and your request will be routed to the correct contact within Qualtrics or RBI.

You may also reference [https://www.qualtrics.com/support/](https://www.qualtrics.com/support/), which provides a large library of support documentation for Qualtrics that may be used at any time to self-serve.