CSO AND IRC MEETING
May 2009, Johannesburg, SA

CBOK 2010 Research Project
Background Document for Discussions

INTRODUCTION

Following the CBOK 2006 research project, the CBOK 2010 Steering Committee has recently started with the development of the 2010 project. Based on Lessons Learned from CBOK 2006, the committee members are focusing on improving many parts of the project including the survey process itself and the project deliverables. Please see below overview of differences between the two projects.

CBOK Lessons learned

CBOK 2006	CBOK 2010
• Snapshot of the profession in 2006	• Forward looking study spanning period of 2010-2015 and ability for trending with 2006
• Academic led study	• Practitioner and academic leaders
• Practitioner respondents only	• Practitioner and other stakeholder respondents
• SPSS software needed for detailed data analysis	• User-friendly *Business Intelligence (BI)* software eases data analysis (fees may apply)
• Limited access to database; mailed on CD	• BI database available in searchable format on-line with outputs to Microsoft suite (fees may apply)
• One-time output of 400+ page book	• Multiple outputs including quick-read modular type reports
• Cultural clustering of results making analysis difficult	• Cultural clustering will not be used in reporting

At this time, the committee wants to ask **your** input and advice regarding:

- The support institutes need during the pre-live survey process (translation, marketing)
- Suggested deliverables

Successful implementation and excellent deliverables of this large research project will depend on our institutes: please let your voice be heard and take actively part in the discussions.

Below you will find a short overview about the project status and background information regarding the discussion items.

Project Status and Planning

Survey

- Draft survey has been finalized
  - CBOK 2010 draft survey is based on CBOK 2006 survey to guarantee trending of data.
  - Questions have been removed/improved and/or added to improve usefulness of data.
  - Draft survey pilots to take place at Leadership Conference and Global Council.
  - Draft survey will go through final review and editing process in June 2009.
  - Final survey to be available for translation by July 2009.
- Outside survey provider has been selected to guarantee an effortless survey process.
  - Respondents will be able to finish survey in different phases/at different times; however they must use the same computer and “cookies” need to be accepted.
  - Estimated survey duration at this time: 30 – 40 min.

Survey Translation

- Survey to be translated into approx. 15 languages in cooperation with IIA institutes (see included overview of available languages in 2006).
- Translation should be finished by September 15, 2009.
- Funding available for translations for institutes in World Bank Tier 3 and 4.
- Document that will be sent for translation will indicate which questions have changed and/or are added or deleted compared to 2006.

Survey Technical Preparation Timeline

- October 2009 - Survey upload
- November 2009 - Survey testing
- December 2009 - Implementation of testing issues
- Early 2010 - Survey goes live

Survey Marketing Timeline
August – December 2009

DISCUSSION ON INSTITUTE NEEDS

The Steering Committee members and IIARF would like to know the best way to support our institutes during the pre-live survey project phase:
Survey Translation

- Time constraints
- Financial constraints
- Any other items to discuss

Marketing of survey

- Type of material needed (please note material will be provided in English only): printed, online, flyer size or larger brochures
- When is material needed
- How could institutes increase responses from their members
- What could IIARF do to help institutes increase member responses (e.g. offer financial bonus to institutes for CBOK research that increase membership participation with more than x% compared to 2006.)

DISCUSSION ON PROJECT DELIVERABLES

Based on Lessons Learned from CBOK 2006, the CBOK 2010 Steering Committee has decided that deliverables of the 2010 survey should provide easy and quick access to data for IIA institutes and IA practitioners.
At the moment a Deliverables sub-committee including the following members: Dominique Vincenti (chair), Béatrice Kizerbo (France), Claudelle von Eck (South Africa), Sakiko Sakai (Japan), Todd Davies (Australia) and <open member > of IIA-China is looking into different type of deliverables.

The following is considered:

1. **Searchable Online Database for IIA institutes (see included examples of reporting options after page 4)**
   - Provides access to data in different reporting formats; very flexible reporting based on Business Intelligence software.
   - Language: English
   - Available Q3 of 2010
   - Cost: covered by IIARF

2. **Modular Reports**
   - Different reports per subject based on data analysis (suggested format: GTAG like reports)
   - Subjects to be determined

- First reports to be delivered during 2nd half of 2010
- Language: English
- Cost: free downloads (hard copy cost are not yet known)

Questions for our institutes:

- How would you use the database in your region?
- What kind of reporting, do you think is useful?
- How useful do you consider these deliverables?
- What other types of deliverables would you suggest?

CBOK Steering Committee Members would like to Thank You
for offering your valuable input and comments!

CBOK 2006 Survey Languages

Arabic*
Bulgarian
Chinese (Traditional and Simplified)
Czech
English
French
German
Indonesian
Italian
Japanese
Polish
Portuguese (Brazilian)
Russian
Swedish
Spanish
Turkish

*Only 4 *not* usable responses were received in 2006 in Arabic; others from the region answered survey in English; for that reason Arabic might not be offered as a language in the 2010 survey

Sample Interactive Report

NPS Analysis Report

Document View Insert Save Find Undo Redo Zoom 100% 1 Edit Query Refresh Data

Available Objects

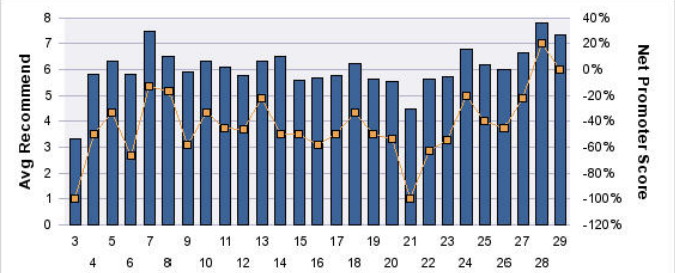
Remove Add Edit

- Available Objects
  - Accountvalue
  - Gender
  - Howlongasacustomer
  - Industry (q2)
  - Industry Question Text
  - Location (q4)
  - Location Question Text
  - NPS Categories
  - NPS Question Text
  - Nps (q6)
  - Overall Satisfaction (q1)
  - Region (q5)
  - Week of Customer Respons
  - Average Overall Satisfactio
  - Avg Recommend
  - Avg Recommend Competito
  - CustFrequency
  - Detractor Count
  - Freq Overall Satisfaction (q
  - Net Promoter Score
  - Neutral Count
  - Promoter Count
- Variables
- Formulas
  - =[Average Overall Satisfac
  - =[Average Satisfac

Variables Available for Drag & Drop

NPS and Satisfaction Report

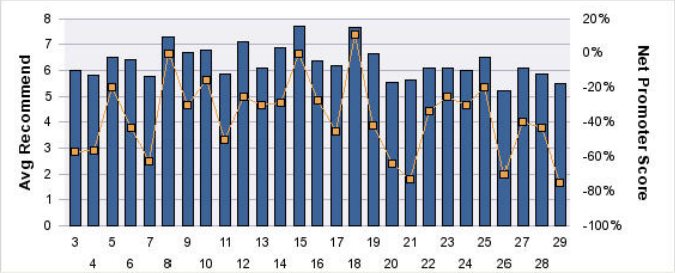
Greater than 350M



Length of Relationship	Average Overall Satisfaction (q1)	Below or Above Average
Greater than 5 Years	2.91	-0.12
Between 3 and 5 Years	2.97	-0.07
Between 1 and 3 Years	3.18	0.14
Less than 1 Year	3.09	0.05
Average	3.04	

Pre-Configured Drill-Downs and Customizable Triggers

Between 250-350M

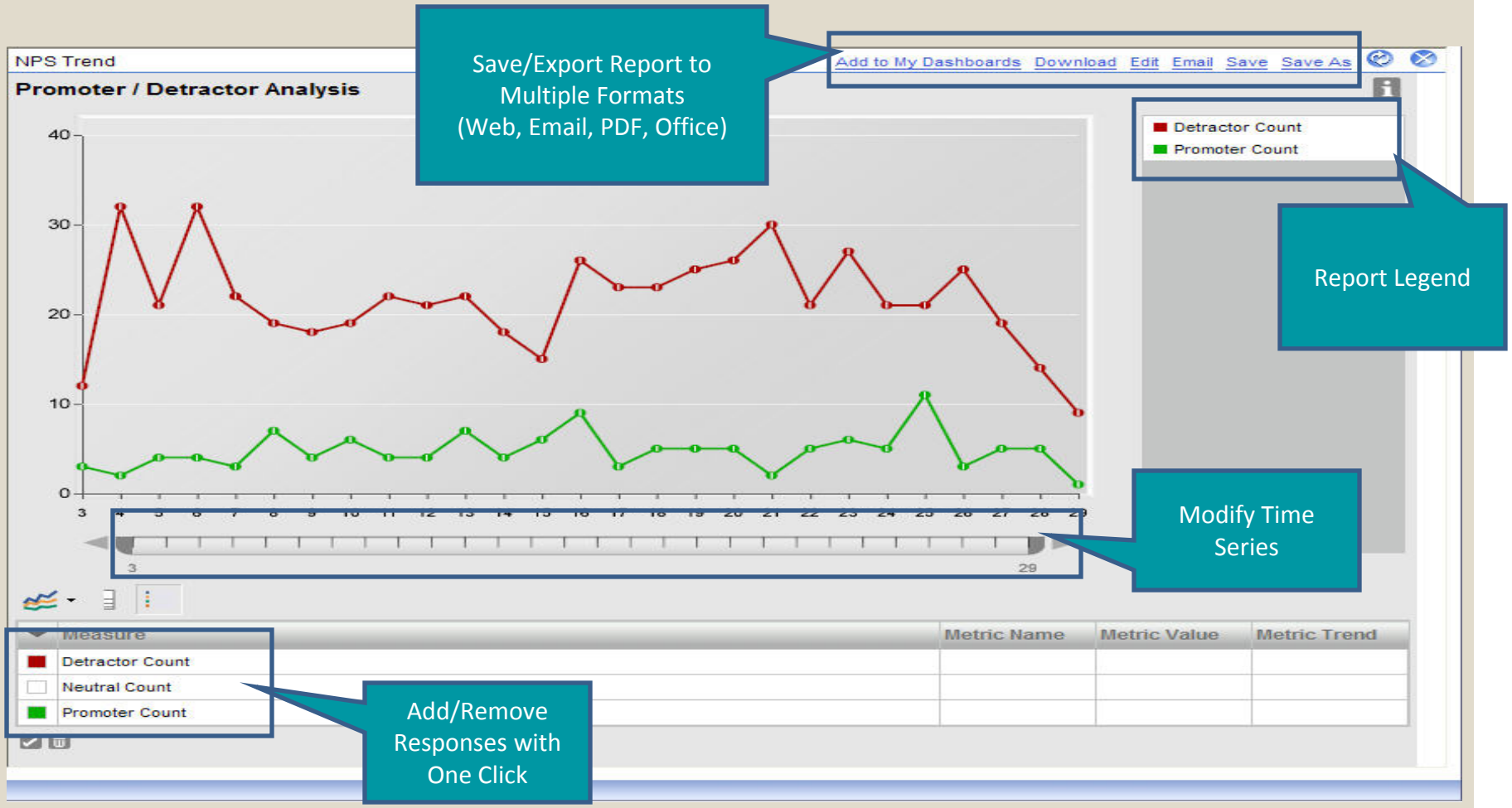


Length of Relationship	Average Overall Satisfaction (q1)	Below or Above Average
Greater than 5 Years	3.11	-0.08
Between 3 and 5 Years	3.07	-0.12
Between 1 and 3 Years	3.26	0.07
Less than 1 Year	3.31	0.12
Average	3.19	

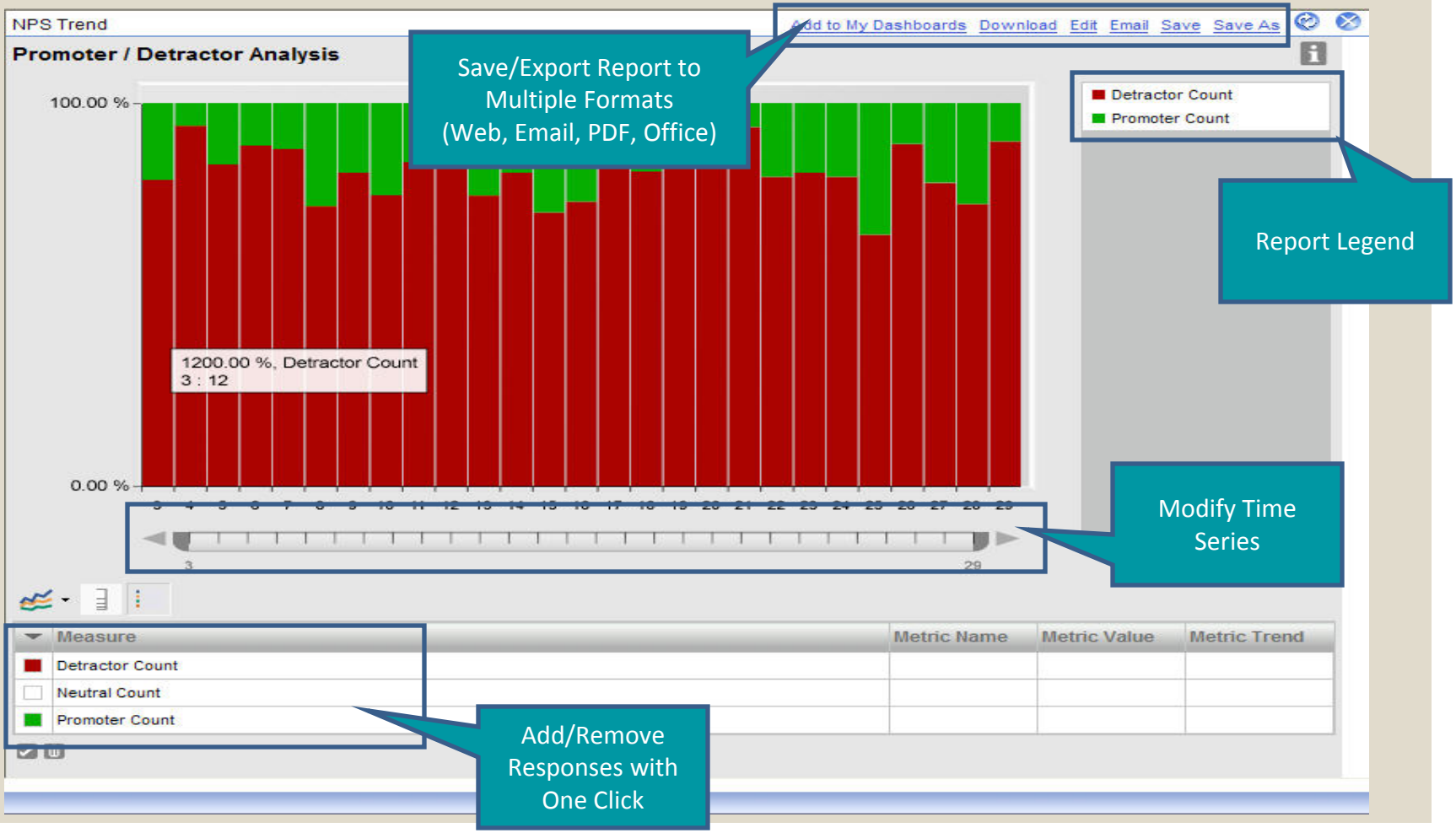
NPS Analysis | NPS Driver Report | Satisfaction Drill Down | Cross Tab

Refresh Date: August 25, 2008 1:28:21 PM

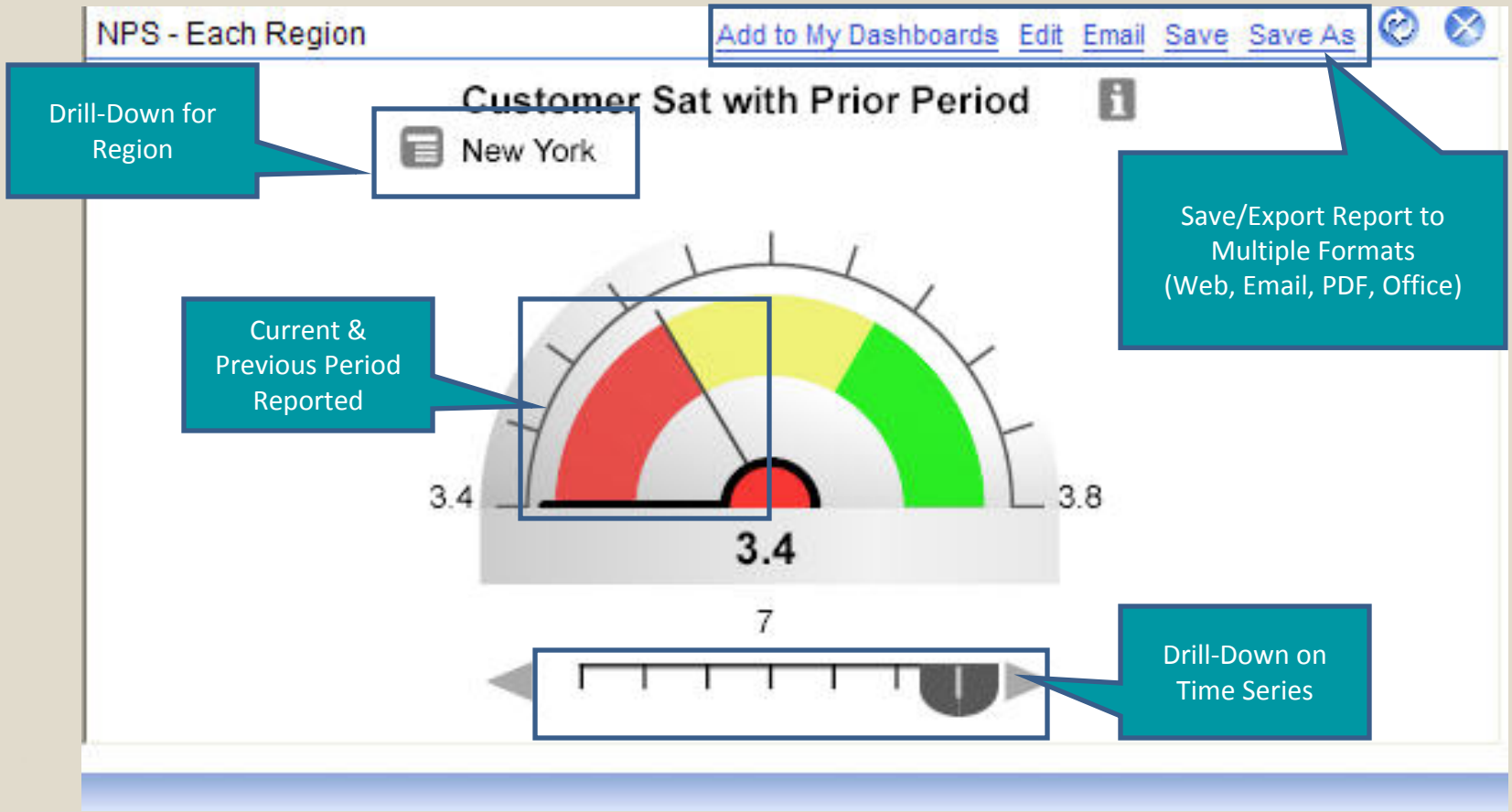
Sample Dashboard Line Graph



Sample Dashboard Bar Graph



Sample Metric Gauge



Thicker needle represents current period; thinner represents previous

The Institute of Internal Auditors Research Foundation