

How OneDigital uses feedback to connect employees to their benefits programs



Stats

100+ offices
85,000+ customers
7,000 surveys sent in a single week

Company:

OneDigital

Strategic goal:

Gain organization-wide control over customer feedback programs
Help customers engage members
Understand brand awareness and satisfaction

Solution:

SurveyMonkey Enterprise
Eloqua integration

Success factors:

Ease of use
Ability to benchmark
Integration with marketing platform



Our goal is to really have that light bulb moment, that aha moment where employees say, 'This makes sense. I get it. This is different than how I've ever been engaging with my benefits in the past.'



Heather Rabinowitz
vice president of member engagement,
OneDigital

THE CHALLENGE

Bringing benefits to life

Since its founding in 2000, OneDigital has evolved into the nation's leading health, retirement/wealth, and HR advisory firm focused on empowering business growth for employers of all sizes. The company stands out in the industry due to its focus on its customers' members, not just on the customers themselves. That focus on the end-user drives a lot of OneDigital's strategies and the programs it builds, and it's enabled by a key part of OneDigital's toolbox: SurveyMonkey Enterprise.

THE SOLUTION

Enabling accessibility and collaboration across the organization

OneDigital's teams had long used SurveyMonkey tools to collect customer and end-user feedback, but

the company upgraded to SurveyMonkey Enterprise to enable an organization-wide view of data. With the enterprise platform, OneDigital vice president of member engagement Heather Rabinowitz's team has been able to create templates, incorporate branding, and take control of how departments across the organization gather feedback. This promotes accessibility and collaboration, Rabinowitz said, while enabling OneDigital to help customers understand and engage their members.

OneDigital also leverages the platform's integration with Oracle® Eloqua to better segment leads; gain a richer understanding of customer sentiment, effort, and Net Promoter Score®; and build even stronger marketing strategies. Feedback collected daily via pulse surveys is automatically funneled into Power BI, making it easy to identify potential problems or gaps in service earlier.



From a brand awareness standpoint, this has really been a key driver for us in letting us know where we stand in the market in terms of Net Promoter and customer effort. It has been a huge driver for projects that we've launched internally to really drive innovation in our industry.



Ashley Lodge
senior marketing
specialist, OneDigital

THE RESULTS

Taking a data-first approach

Rabinowitz said one of the key benefits of SurveyMonkey Enterprise is being able to create and access benchmarking data.

"For the first time, all of the results are accessible at a high level," Rabinowitz said. "Once this is all fueled into the Power BI dashboard, we're able to slice and dice by industry, customer size, and survey type and see on a broad scale specific insights related to our customers, which we really haven't been able to secure before."

The benchmark data is then used to inform OneDigital's sales and customer retention strategies with a data-first approach, Lodge added.

"We're able to have conversations with our teams: 'This is what our customers are saying directly, and here's what we can do about it,'" Lodge said. "And then also from a new customer standpoint, we're able to take the data and build RFP responses around it that can help us drive new customer conversations going forward."

Rabinowitz said OneDigital employees appreciate the ease of use and analysis the enterprise platform offers. In addition, the Eloqua integration frees OneDigital from having to ask for customer identification data—for example, name and email address—which helps reduce the number of questions OneDigital asks.

Overall, SurveyMonkey Enterprise empowers OneDigital's teams and customers to drive meaningful progress as it relates to the employee experience. In one case, OneDigital leveraged the enterprise platform to help a large health system bridge a communication gap with employees. The health system was convinced that its employees didn't want to receive any communications via email. OneDigital also used the enterprise platform to ask employees about their communication preferences, frequency of communications, preferred topics, content, and more—and the results were surprising.

"The results were ridiculously skewed toward 'Everybody wants email, and we want to hear from you quarterly,'" Rabinowitz said. "We were about to go completely mobile, when really the data was telling us to go elsewhere. It saved our strategy, I think, in the long run."