

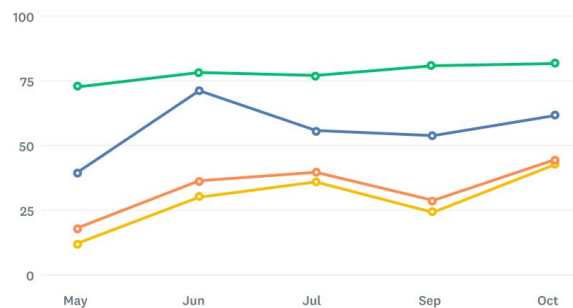
GUIDE

Get deeper survey insights with Tableau and Microsoft Power BI

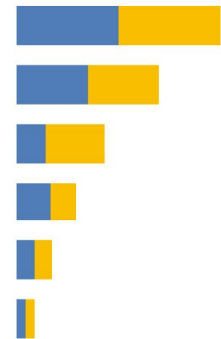
How to make better decisions by combining SurveyMonkey feedback with operational data.



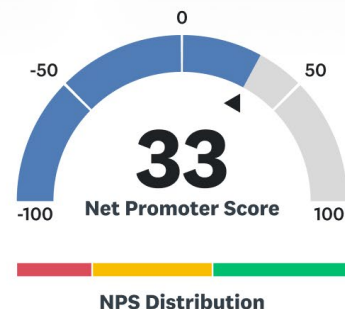
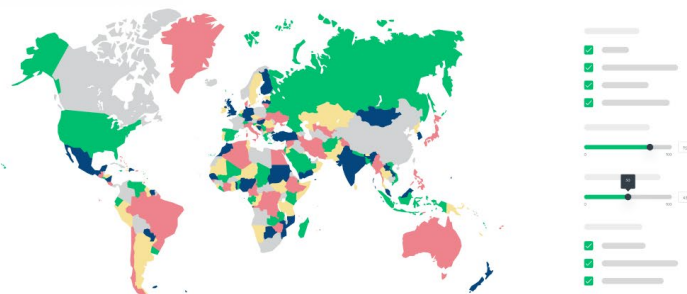
Monthly CSAT by Product Line



Product use by account type



Customer Location



Introduction

Surveys are a great way to understand how people feel about your company and the products, services, and experiences you provide—which is why our [customer feedback survey templates](#) are so popular with so many businesses. But if you want to make feedback even more valuable, the key is to combine it with operational data.

This approach adds context to your findings. For example, let's say that you've seen a dip in customer satisfaction (CSAT) scores overall. That data isn't really actionable without deeper analysis. Does the change in CSAT vary by product or geographic location? Are there points in the customer journey with lower scores, like first-time customers vs. established users? This kind of operational data can enhance your survey data, leading to richer insights and a more holistic view of your business.

And that's where SurveyMonkey integrations come in. With business intelligence (BI) integrations like [Tableau](#) and [Power BI](#), it's easy to visualize data, maximize insights, and take action.

BI integrations allow teams to easily slice data by specific attributes, and focus on the areas they care about. Customer feedback about a particular product can be directed to a product team, while a service issue can be elevated to customer support. In addition, BI integrations remove the manual effort of updating charts or spreadsheets as new data comes in. Dashboards are automatically refreshed with the latest results, so you can make faster decisions based on fresh insights.



Read on to find out how to multiply the power of SurveyMonkey with Power BI and Tableau—and make the right moves to improve the customer experience.

- [How to use data analytics integrations with SurveyMonkey](#)
- [3 benefits of incorporating survey data in Power BI and Tableau](#)
- [Integration inspiration: Power BI and Tableau tips for teams](#)

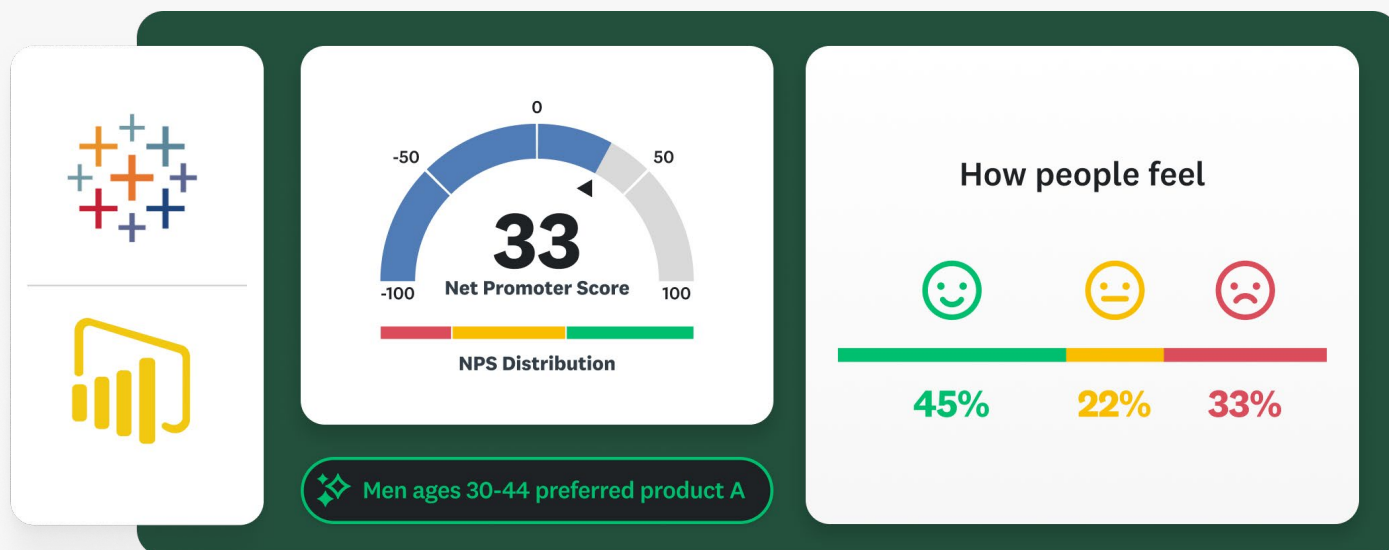
How to use data analytics integrations with SurveyMonkey

Each interaction your company has with a customer is an opportunity to gain more insights. Net Promoter Score (NPS®), in particular, is a metric that can add context and meaning to other data your organization collects. It can also be applied to a wide variety of use cases, from tracking customer loyalty to uncovering customer satisfaction with a product or experience.

Combining NPS data with operational data allows you to understand what parts of the customer journey are getting a positive rating and what parts need to improve. A new product might be getting a high NPS, but

what if you found that customers in a specific geographic area were giving it a very low score? Or what if you combined customer lifecycle data with NPS data and learned that first-time customers were giving a product a lower NPS than customers who added the product to their deployment?

This kind of deeper data dive leads to more meaningful insights. For example, a low NPS from first-time customers could indicate a training or user adoption issue. Viewing NPS by geography might simply reflect that people in Brazil, for example, have a tendency to give higher NPS scores than people in The Netherlands.



Here’s an example of how one SurveyMonkey customer improved NPS by viewing feedback alongside other operational data.

LIONBRIDGE

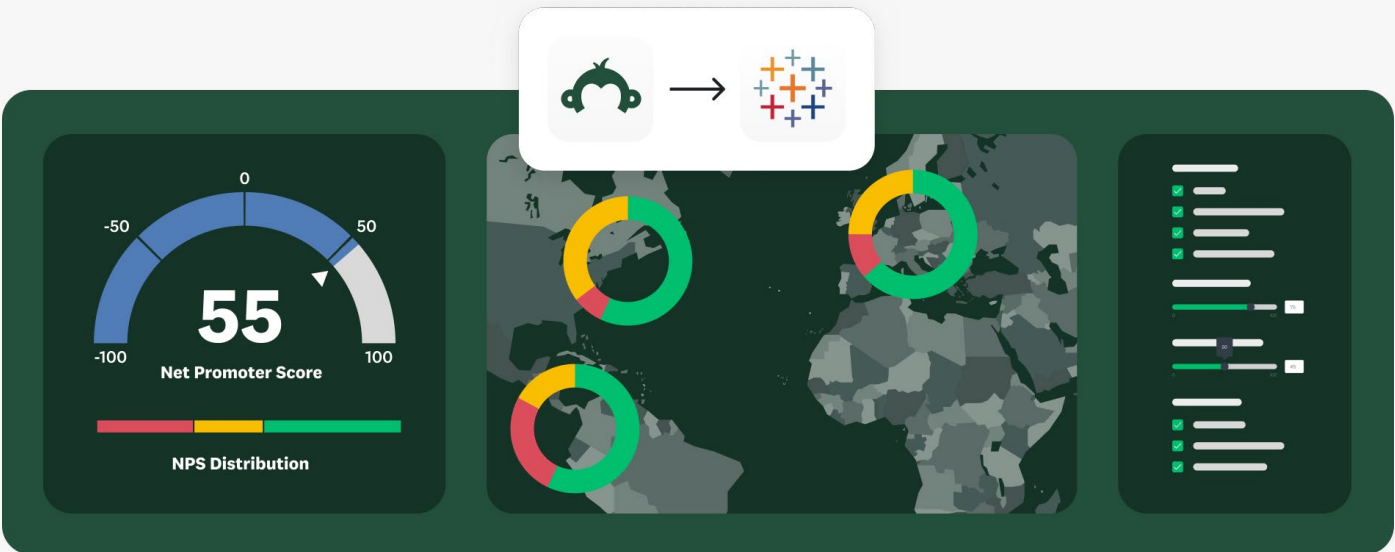
SurveyMonkey + Power BI dashboards = 30% NPS boost

Global translation and localization leader Lionbridge wanted to raise the bar on customer service and reach an NPS of 35. It started by launching a SurveyMonkey NPS program to 40 customer accounts, and combined NPS scores with other data in Power BI dashboards.

Those dashboards provided a level of detail the previous internal system couldn’t deliver and Lionbridge teams used the visualizations to understand patterns and quickly address areas that need improvement.

Since implementing the suite of tools, Lionbridge saw its NPS increase by 30%. There’s also been a 20% uptick in the number of survey responses compared to the previous system, providing more opportunities to connect with customers and help them solve challenges.

At SurveyMonkey, we similarly use our BI platform—Tableau—to combine customer NPS responses with customer data, like the type of plan our customers are using and where the customer is located. This gives us a better understanding of top drivers of satisfaction, as well as opportunity areas, by product tier.



Our SurveyMonkey customer operations team also has multiple dashboards they've built that allow us to see CSAT results at different lifecycle stages. We can compare CSAT survey feedback from our onboarding team and identify areas of improvement based on trends in the dashboards. Everyone in the company has access to it so we don't run into data gatekeeping; stakeholders can get the data they need to take action.

Here's an example of how a SurveyMonkey customer incorporates the Power BI integration into its CSAT strategies.



Making the most of sky-high CSAT response volume

Ryanair is part of Europe's largest airline group, serving over 160 million travelers per year. That adds up to countless customer touchpoints—and over 500,000 CSAT survey responses per month.

To make sure that massive amount of feedback is actionable, Market Research Manager Rawaa Shami combines it with the SurveyMonkey Microsoft Power BI integration. This helps reveal customer satisfaction around everything from booking and check-in to the in-flight experience and customer service interactions.

Within the Power BI dashboards, Shami and team apply filters by customer type, market, and flight route to get even deeper insights. Plus, it's easy to spin up weekly, monthly, quarterly, and yearly trend reports that go all the way up to the Ryanair C-suite.

[Read the full story](#)



3 benefits of incorporating survey data in Power BI and Tableau

“The SurveyMonkey Power BI integration helps us turn huge amounts of data into actionable insights. It makes it easy to drill down and look at different customer types or specific markets at a granular level.

Rawaa Shami
Market Research Manager
Ryanair

Here are three reasons to integrate your feedback data, including NPS, with other data from across your organization.

1 Get a holistic view of your data and a single source of truth

Establishing a place where stakeholders can access data streamlines the process of finding it; but more importantly, it ensures that data gets used. In addition, having multiple data points from different systems in one place offers a 360-degree view of the customer experience—and can help you pinpoint both areas of potential and where products or services can be improved.

2 Ensure buy-in from stakeholders with clear data and findings

Giving people a data dump often creates more questions than it answers. Conversely, sometimes a single data point, like an NPS ranking, doesn't tell the whole story. Providing multiple views of collected data is an important way to tell your story and get more out of the feedback you collect.

By integrating survey data in Power BI or Tableau, you can create deeper visualizations that provide more insights. Share reports, charts, and graphs from any device—even if stakeholders aren't using the same systems, or don't have access to your survey platform.

3

Use interactive dashboards to give teams access to relevant data

Putting your data to use across your organization helps you get more value out of it. With Power BI and Tableau, you can create interactive dashboards that allow teams to access the data they need. Create different dashboards for different teams so they can get a tailored view of data, discover relevant insights, and take action on their specific goals.

“We can drill into specific areas in the dashboard and then use that information in our team meetings. Our CEO uses the dashboard in his meetings to review the current NPS. We can also give kudos to teams that are doing really well and call out areas in which we need to implement an improvement plan.

Carol Fallon
Senior Director of Operations
Lionbridge

Integration inspiration: Power BI and Tableau tips for teams

In this guide, we've focused on the customer experience—but there are limitless ways teams across your organization can benefit from adding survey data to Power BI and Tableau. Here are a few bonus ideas:

Marketing

- Visualize market research data to make it easier for stakeholders to take action.
- Keep an eye on trends in brand perception from a quarterly brand tracking survey.
- Surface relevant insights about your market or customers in a centralized dashboard for faster decision-making.

Customer Experience (CX)

- Track CX holistically by collecting and monitoring both implicit and explicit data in one place.
- Marry customer feedback with renewals or spend data and uncover patterns.
- Understand how different programs impact customer service satisfaction by combining case-closed feedback with operational metrics and key performance indicators (KPIs).

Human Resources

- Get a 360-degree of experiences throughout the employee lifecycle.
- Segment employee engagement data by attributes, such as location and level, to identify patterns.
- Understand turnover trends by combining qualitative feedback from exit surveys with HR data, like role or tenure.



Woom gets granular employee engagement insights with Power BI and SurveyMonkey

[See the full story](#)

Get started

[Power BI](#) and [Tableau](#) integrations are available as add-ons with [SurveyMonkey Enterprise](#) plans. To learn more, [schedule a demo](#) to get a personalized walk-through of how you can use these integrations to better combine and visualize your survey data with other sources.

If you already have a SurveyMonkey Enterprise plan, contact your customer success manager to add Tableau or Power BI. Once added, you can install the integration from our [app directory](#) and start making your own survey dashboards immediately. And if you need something created for you, our [professional services](#) team is happy to help.



SurveyMonkey is the world's most popular platform for surveys and forms, built for business and loved by users.

Our powerful capabilities and intuitive design make it easy for teams to gather the insights and information they need to create experiences people love. Discover how at surveymonkey.com.

