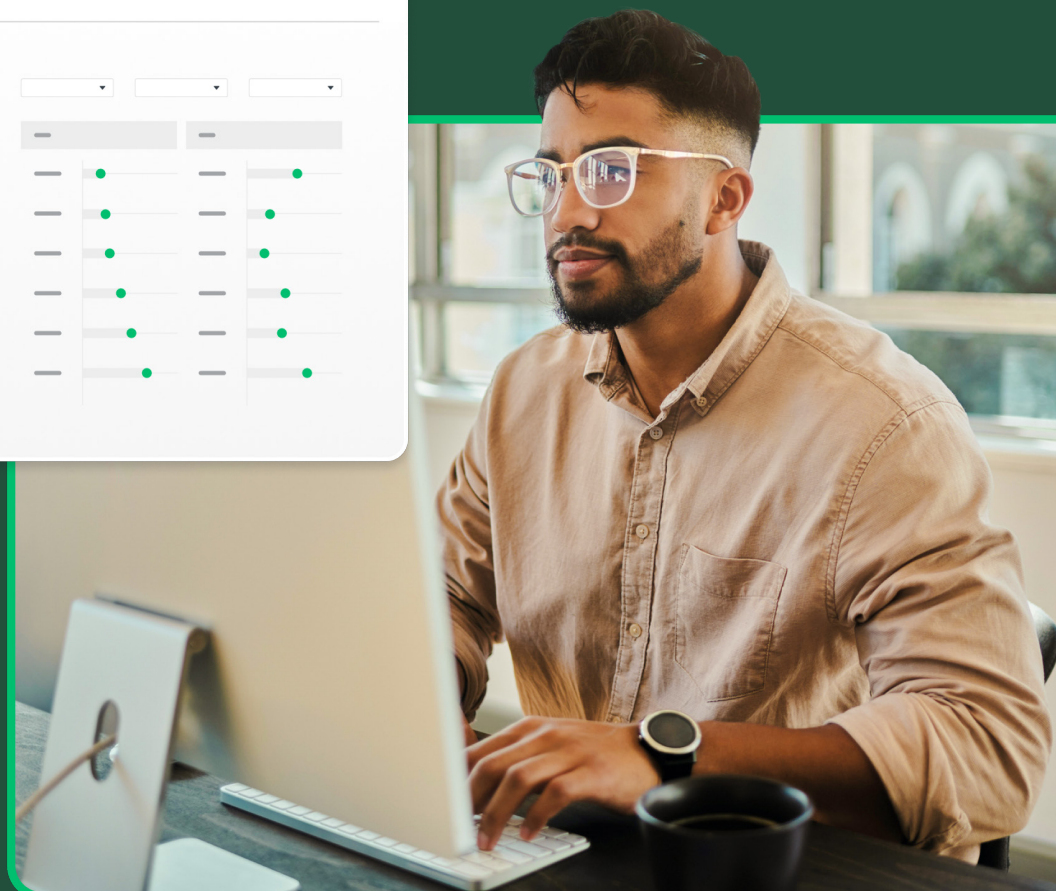
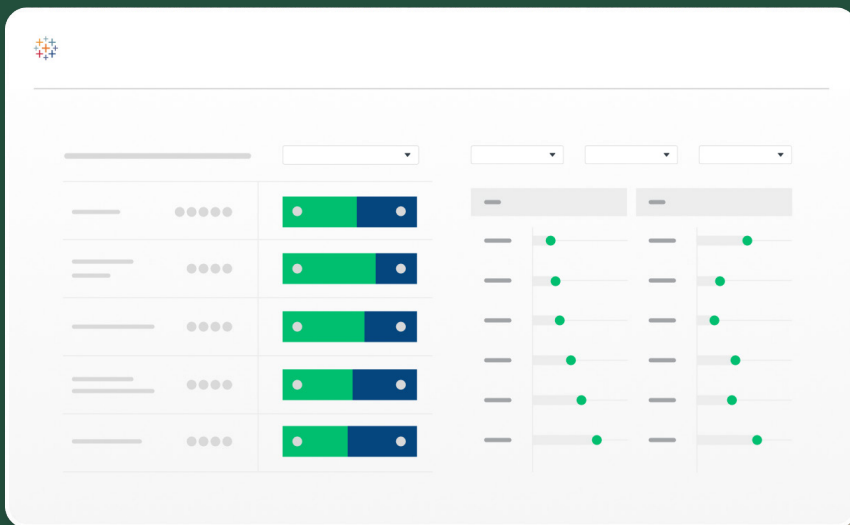


GUIDE

# Get deeper survey insights with Tableau and Microsoft Power BI

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



## Overview: What you'll learn from this guide

Surveys are a great way to understand how people feel about your company and the products, services, and experiences you provide. That feedback can be even more valuable when combined with operational data—like geography, product line, or market segment—which can add context to your findings.

For example, you might see a dip in CSAT scores overall, but that data isn't actionable without deeper analysis. Does the change in CSAT vary by where a customer is located? Is the CSAT score based on a specific product purchased? Are there points in the customer journey associated with lower CSAT scores, like first-time customers vs. established users? These are just a few examples of how marrying your survey data with operational data can lead to deeper insights, and provide a more holistic view of your business.

There are countless scenarios where combining feedback with operational data can spark richer insights, from employee engagement surveys, to win/loss programs. For the purposes of this guide, we'll zero in on customer feedback.

Customer feedback is a great example of collected data that needs context. It's often gathered by multiple departments— including CX, sales, marketing, and product teams. That adds up to a lot of data, and sifting through it is time consuming and can require specialized skills. Manual methods, like spreadsheets, don't always

surface the most relevant insights and are prone to errors. In addition, data is often siloed in disparate systems, making it hard for teams to access insights or know how to find the data that's relevant to them.

That's why SurveyMonkey built integrations with data visualization business intelligence (BI) solutions, including Tableau and Power BI. Integrating survey data with operational data in these BI systems ensures that insights are visible—and accessible—to all teams involved in the customer experience.

BI integrations allow teams to centralize data and view feedback data side by side with operational data for easier comparison. Teams can easily slice data by additional 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 the customer support team. 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 insights—so that you can make decisions based on fresh insights.

Read on to learn how you can get a more holistic view of your data by integrating feedback with operational data in Power BI or Tableau. Having all your data in one place will make it easy for all departments to understand the actions they can take to improve the customer experience.



# Using 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, or checking in with employees; NPS provides a quick way to capture positive or negative sentiment.

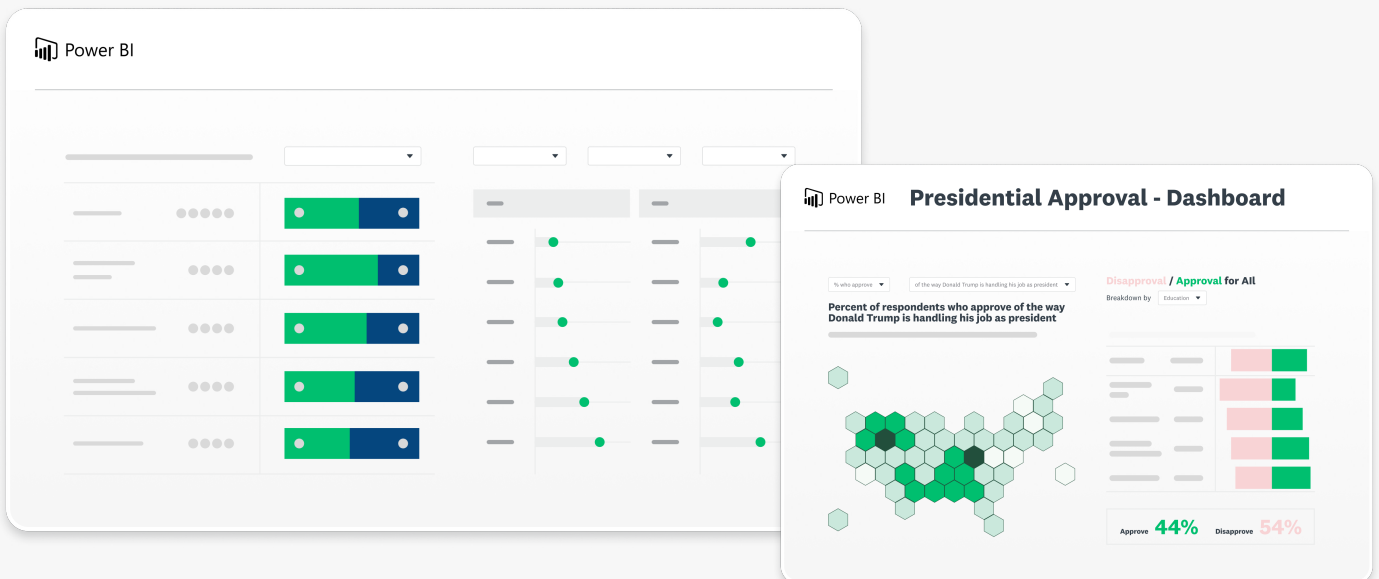
Combining NPS data with operational data allows you to understand what parts of the customer journey are getting a positive rating and what parts need to improve. A new product might be getting a high NPS, but what if you found that

customers in a specific geographic area were giving it a very low score? Or, by combining customer lifecycle data with NPS data, you 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 point 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.

Check out our recent study where we combined NPS scores with customer preferences and compared results across nine countries, worldwide.

[View the report](#)



Here's an example of how one customer improved their NPS by seeing feedback alongside other operational data.



## CUSTOMER STORY

# LIONBRIDGE

Global translation and localization leader Lionbridge wanted to raise the bar on customer service, and reach an NPS of 35. The company started by launching a SurveyMonkey NPS program to 40 customer accounts, and combined NPS scores with other data in Power BI dashboards. Lionbridge teams used visualizations to understand patterns and dive in quickly on areas that needed improvement.

The company also expanded the list of stakeholders to collect more feedback and better insights into how projects and deliverables were working. The Power BI dashboard provided a level of detail the previous internal system couldn't deliver. Since implementing the suite of tools, Lionbridge's team saw their NPS score increase by 30 percent. Carol Fallon, senior director of operations notes that there has also been a 20 percent uptick in the number of survey responses compared to the previous system, providing more opportunities to connect with customers to help them solve challenges.

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

Our 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.



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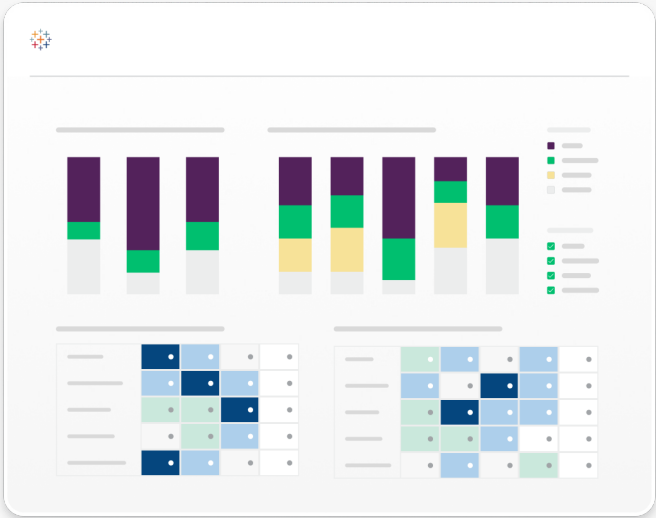
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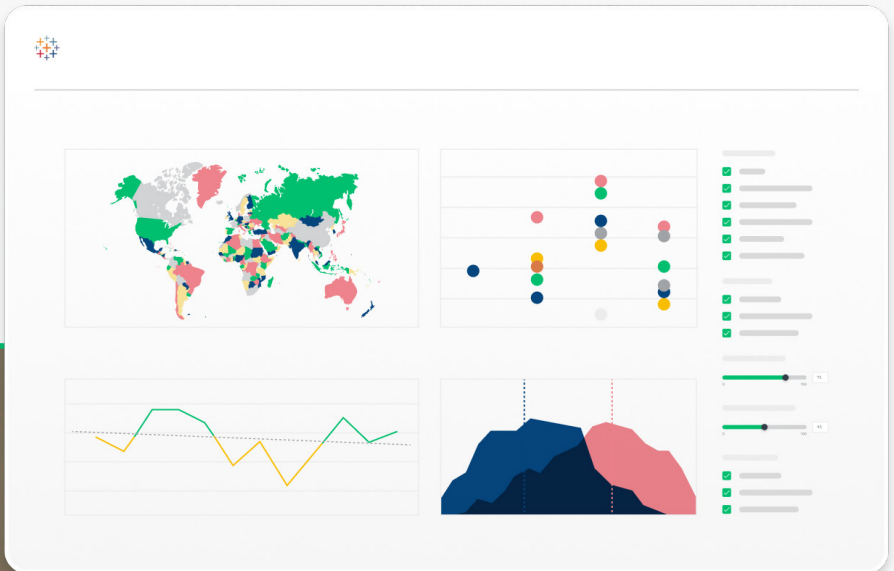
## Upleveling how CX insights are shared

### CUSTOMER STORY



Credit union CoastHills was serious about customer service—the company sent 10,000 NPS surveys each month to members who had teller interactions, incentivizing employees for “perfect” scores. However, getting feedback and analyzing the data took up to 45 days, creating a lag in understanding which

interactions were making an impact. Using the SurveyMonkey Power BI integration, the company can automatically pull data from the NPS survey, which is updated every 3 hours. Previous reporting required a CoastHills employee to pull together a report every month. According to Scott Olson, Senior Vice President of Technology at CoastHills Credit Union, “Some poor person was spending an entire day manually creating a report off some very rough numbers. Now, the report basically creates itself.”

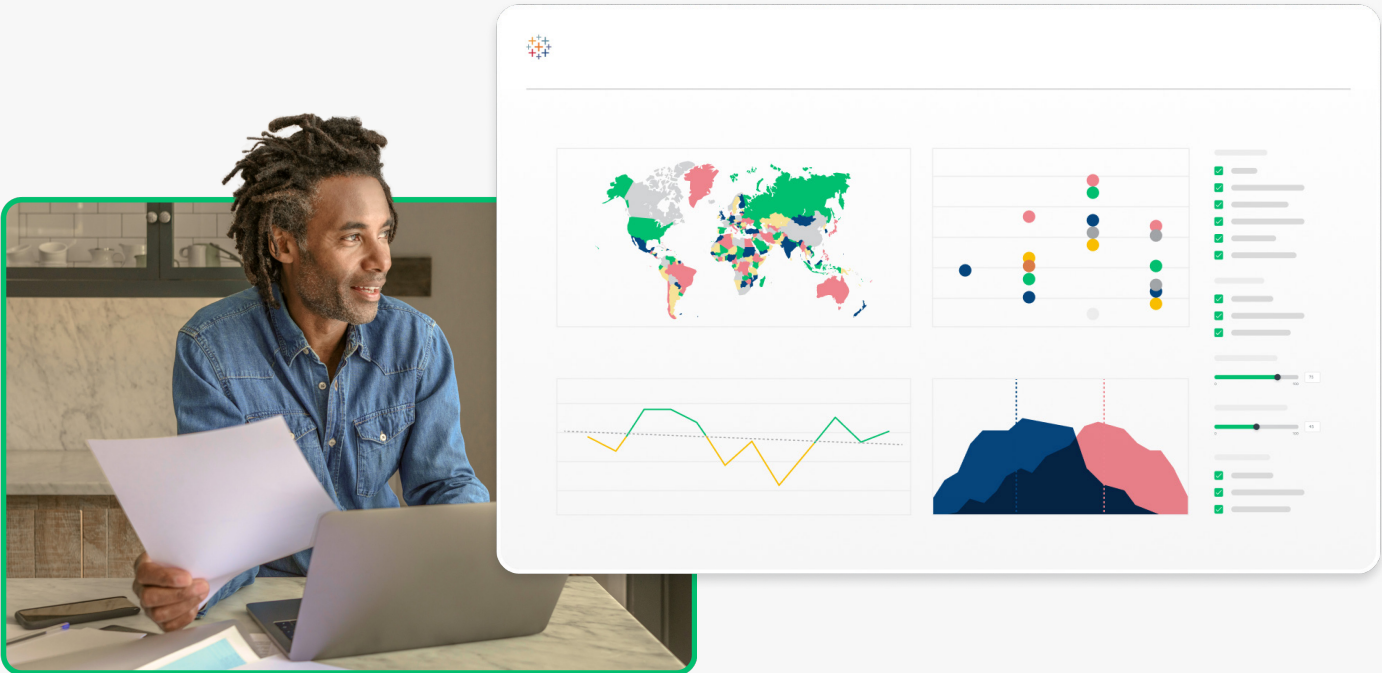


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## 3 benefits of incorporating survey data in Power BI and Tableau

“ We needed to see key strengths and weaknesses across the organization, comparing quarter to quarter or year over year, and have a systematic way to action the feedback across accounts.

Carol Fallon  
Senior Director of Operations  
Lionbridge

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 by clearly sharing 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 the organization helps you get more value out of the data you collect. 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 get the view of data that they can put into action.

“ 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



# More ways teams can use Power BI and Tableau integrations

There are limitless ways teams across the organization can benefit from combining survey data in Power BI and Tableau. Here are just a few examples:

## Marketing

- Visualize market research data to make it easier for your stakeholders to take action
- Trend brand perception over time from your 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 view 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

## Get started

Visit our app store to learn more about [Power BI](#) and [Tableau](#) integrations with SurveyMonkey. Or, check out the analytics capabilities in [SurveyMonkey Enterprise](#).

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