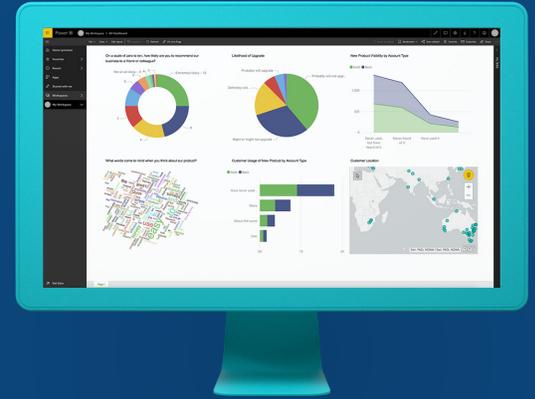


Improving NPS and customer care by visualizing feedback in Power BI



CoastHills credit union sent 10,000 surveys each month to track customer satisfaction, but a slow and cumbersome reporting process delayed feedback and hampered efforts to improve service.



Success metric
Customer satisfaction
Net Promoter Score® (NPS®)



Solution
SurveyMonkey CX
Microsoft Power BI Integration
SurveyMonkey Enterprise



Outcome
NPS trended from 65 to 70
Reduced time to insights from 45 days to 3 hours

THE CHALLENGE

More timely feedback to drive action

CoastHills, the largest credit union in California's central coast with \$1 billion in assets and 66,000 members, was committed to improving customer service by getting regular feedback from customers after each teller interaction. However, the company had outsourced the survey process, and getting feedback took up to 45 days. Once survey results came in, it took CoastHills employees several additional days to analyze the data and create a report.

Tellers, who received incentives for "perfect" customer service scores, had no idea what their incentive payouts would be for the previous month, and couldn't make a clear connection between their service interactions and customer feedback.

THE ANSWER

Seeing customer feedback in near real time

The company added SurveyMonkey CX and the Microsoft Power BI integration to their SurveyMonkey Enterprise deployment to take control of the entire process—from collecting feedback to analysis and reporting. Scott Olson, AVP of Business Intelligence, set up a process to automatically trigger NPS surveys from SurveyMonkey CX after each teller interaction.



Scott Olson
AVP Business
Intelligence

The Power BI integration offered an interactive way to share insights in near real time and at all levels; from branch managers to tellers and the executive board. Feedback is now updated every 3 hours, so branches have access to service interactions and can handle low scores immediately.

Branch personnel use a Power BI dashboard to view visual reports and filters, and can drill down into almost any metric or response. “A branch manager can look at all their surveys, export to an Excel spreadsheet and review it with a teller,” says Scott Olson, CoastHills AVP of Business Intelligence. “They can go over individual NPS, negative feedback, and perfect scores, so a teller has immediate insights into their interactions.”

CoastHills is also able to track trends and analyze how each branch is doing, and compare company performance to other financial institutions. They use key driver analysis to determine their strengths and areas of weakness, and make adjustments accordingly.



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SCOTT OLSON, COASTHILLS AVP OF BUSINESS INTELLIGENCE

Industry

Financial services

Use case

Customer care
Team performance
NPS

Products

SurveyMonkey CX
SurveyMonkey Enterprise
Power BI Integration

Success factors

Improved NPS
Improved customer satisfaction

THE RESULTS

New levels of NPS success

Since using the integration, CoastHills has reached NPS levels of 70 or higher, from previous scores of 65, and tellers are more motivated to get “perfect” service reviews. The new NPS is exceptional for a financial institution, which according to SurveyMonkey’s NPS benchmarks, are usually around 39. With an NPS of 70, CoastHills can sell their value to their board.

“Over time, the tellers are getting better and better at their jobs, and are making our customers happy because they’re getting that instant feedback,” says Scott. “I really like the fact that we can see our progress,” says Scott. “Our trend is gradually going up.”