



Customer Success & Insights

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Customer Survey Analysis

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Agenda

1. Executive Summary
2. Methodology
3. What does the Data tell us?
4. Additional insights through Text Analytics
5. Recommendations



Problem Statement

“Why do NPS score vary so much quarterly?”

Why are NPS scores so low ?

How does [REDACTED] ensure to improve NPS score going forward?”



Executive Summary

The response rate is too low - no information for 85% of customer

No consistent respondents, there are new respondents every quarter

There are valuable insights from the comments

Methodology

Data description:

- NPS survey result in Excel: FY15 to FY18, 15 quarters
- Sample NPS survey questions: by role and a complete version of all questions
- Others: Root Cause, Customer for Life Program

Hypothesis

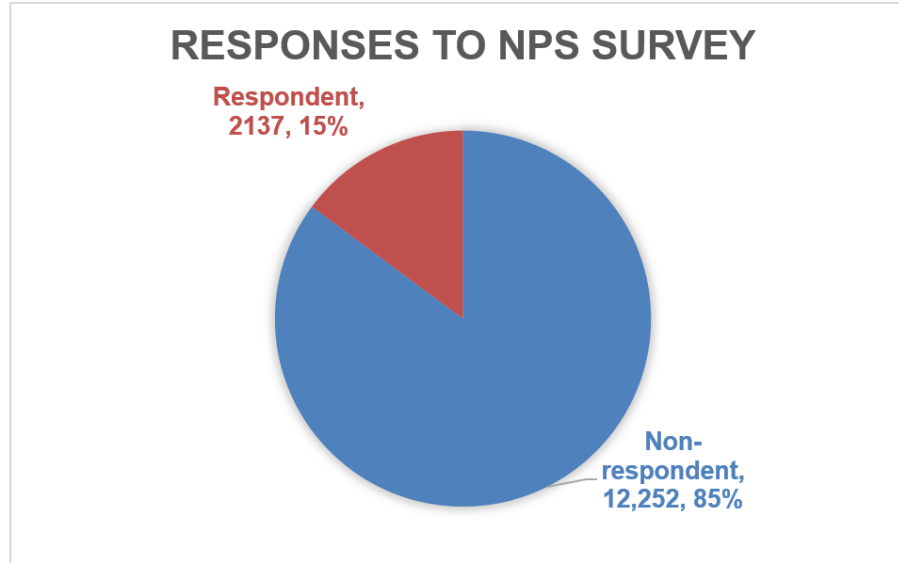
- Disconnection in customer journey - onboarding vs adoption and ongoing support
- Different individuals answering the survey - frequency and user level
- Scores jump because same individuals change their mind

What we did

- Cleaned the data
- Looked at percentage of detractor/passive/promoter from various aspects
- Looked for patterns in non respondents vs respondents
- Text analysis
- Best practices for NPS surveys

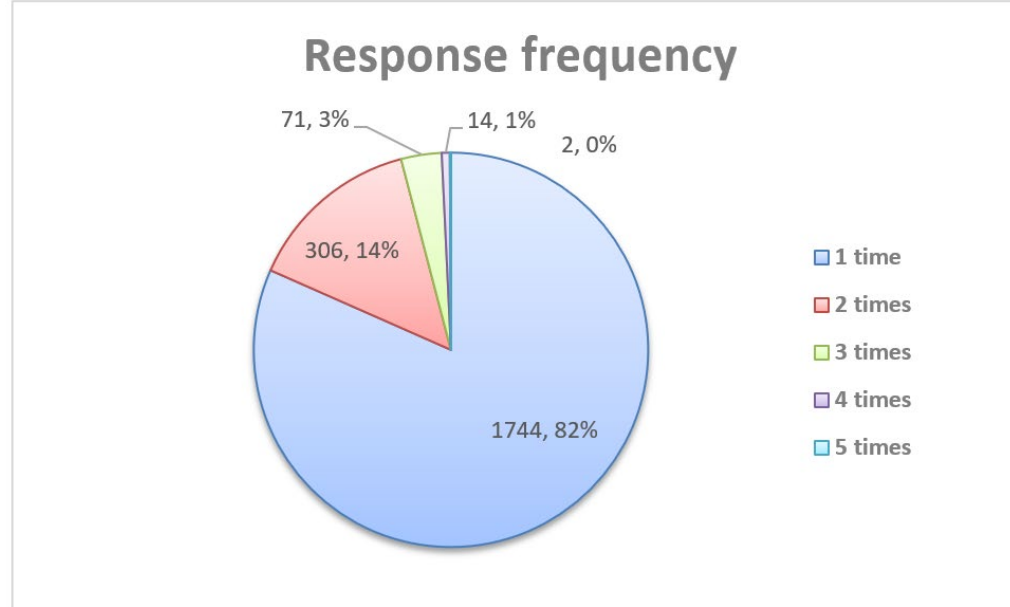
*What does the data
tell us?*

Low response rate



Only 15% of the people who were surveyed responded.

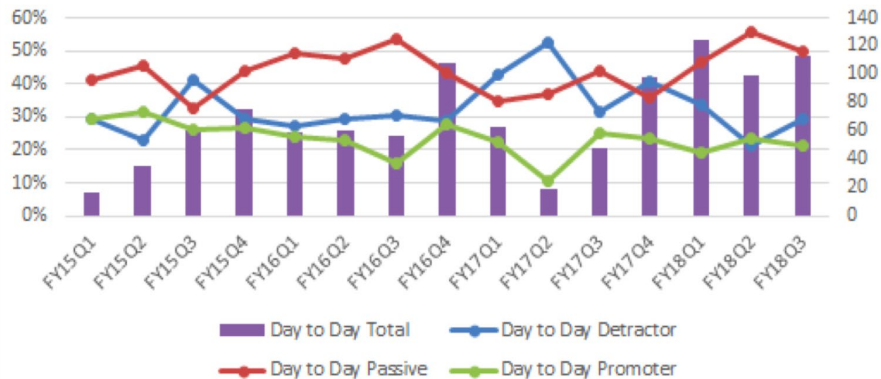
Inconsistency of responses



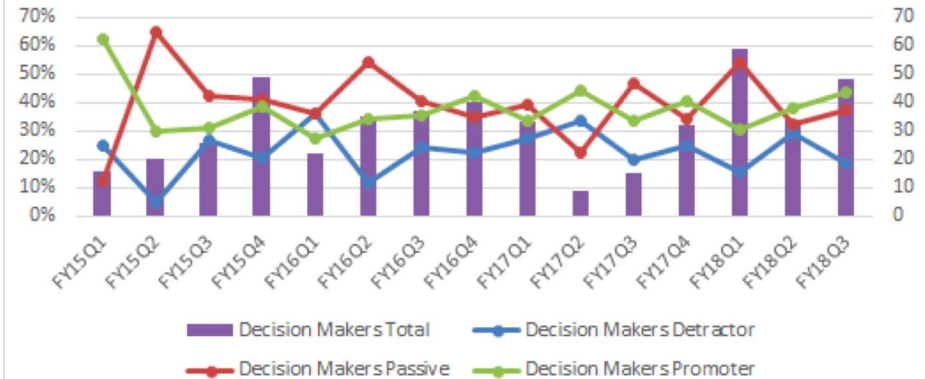
Only 18% of people surveyed responded multiple times.

Insights from one-time-respondents

(2) Percentage of one-time-respondent for each sentiments in Day-to-day role



(3) Percentage of one-time-respondent for each sentiments in Decision Maker role



Observed different patterns between Day-to-day and Decision-Maker:

- Day-to-day: More Detractor and Passive users than Promoter
- Decision Maker: Fewer Detractor, similar percentage of Passive and Promoter

Insights from more-than-1-time respondents



Looked at each individuals' NPS score and their comments over time

How we picked the respondents:

- Responded for more than 1 time
- Responded recently (FY17-FY18)
- Had their NPS increased/unchanged/decreased

Hypothesis:

- NPS scores would improve if customers were followed up
- NPS scores were affected by the change of Account Manager

Findings



Salesforce ID	Reconciled Role	# of response	FY16Q3	FY16Q4	FY17Q1	FY17Q2	FY17Q3	FY17Q4	FY18Q1	FY18Q2	FY18Q3	NPS Comment	Some patterns we recognized
	Day to Day	3	8	0	0	0	8	0	0	0	7	I am neutral on my recommendations - the reporting and lack of smart lists are behind your competitors	NPS decreased over time. Changed Account Manager recently. Comment about the product
	Decision Makers	3	9	0	0	0	8	0	0	0	6		NPS decreased significantly without any comments
	Decision Makers	3	10	0	0	0	8	0	0	0	6	The journal entry printout is hard to read. It would be nice if it looked like it does on the screen	NPS decreased significantly with some comments
	Decision Makers	3	7	0	0	0	7	0	0	0	7		NPS unchanged over time
	Day to Day	3	8	0	0	0	8	0	0	0	8		Account Manager changed every time but NPS unchanged
	Decision Makers	4	6	0	0	0	6	0	0	0	7		NPS increased over time
	Decision Makers	3	3	0	0	0	8	0	0	0	8		NPS increased over time

- Different patterns in the NPS of individuals.
- Could not conclude that the change of Account Manager was the main reason for NPS decrease
- Hard to conclude that NPS decreased/increased because of a specific reason

Insights from non-respondents



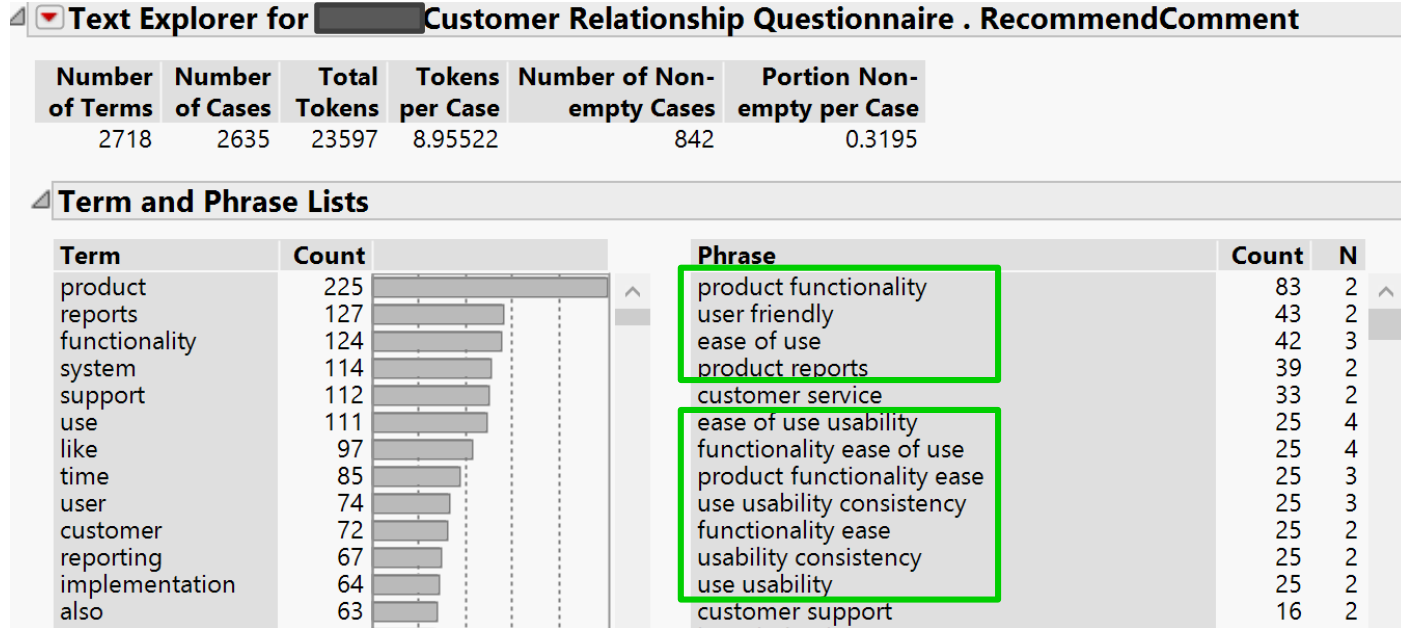
Analyzed survey questionnaire

Looked at Non-respondents by **Segments**:

- Emerging Segment slightly more responsive - **12%**
- Generally, across all segments non response rate - **90%**
- High Touch = More likely to respond ----> not supported by data (See appendix)

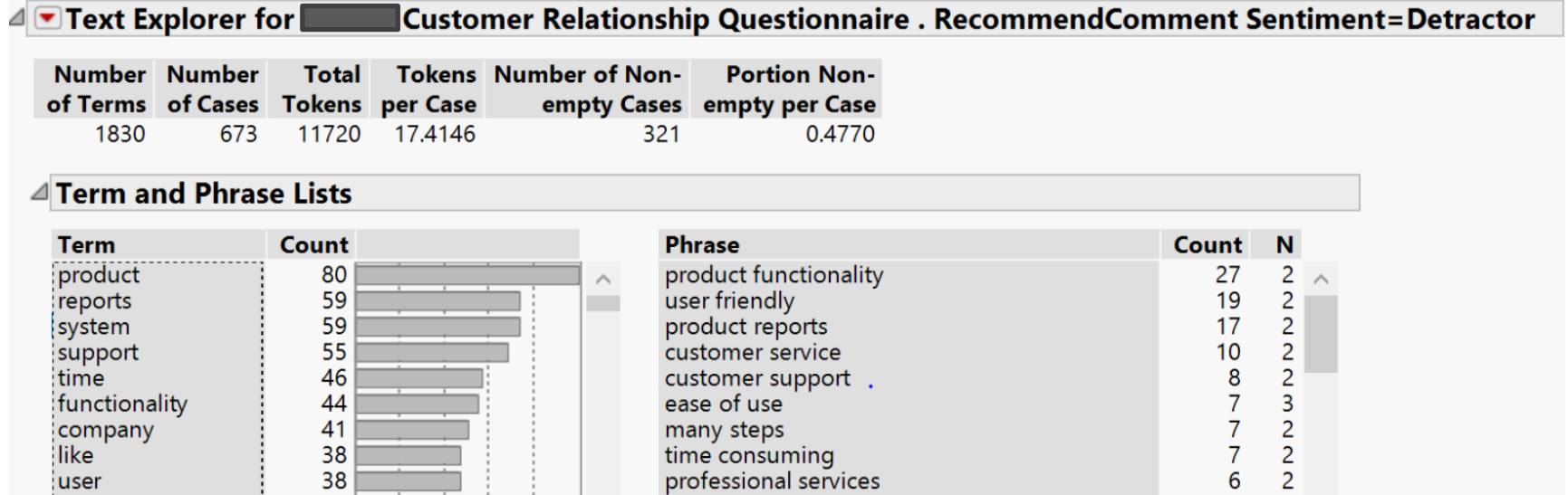
Additional insights

Text explorer - All respondent



Product and **functionality** related words appeared 2-3 times more than **Customer Service** or **Support**

Detractors



Similarly, **Product** and **functionality related** words appeared 2-3 times more than **Customer Service** or **Support**

Some comments



We are a larger company and implementation was a nightmare, we have to do a manual bank reconciliation process and we have hundreds of transactions every day, the **system** does not allow us to pay bills the way we would like because it cannot handles the amount of credits and invoices that our company has, and there are many other reasons. When we have worked with support or management, no one seems to be able to help us with our problems so we have given up! [1071]

The **system** is very difficult to use for reporting and is prohibitively difficult with anything to do with cash. Once something is paid, it cannot be edited. Cash reporting is extremely limited. Reporting in general is poor and we continue to have to rely on Excel to financial reporting. Also, it has terrible approval processes...we have to seek outside software/service to make up for the lacking element. [1072]

Reporting is very cumbersome to design. Statistical accounts are limited to unit accounts, as such cannot accommodate currency. **System** was oversold vs. what it can do, especially on Advance Revenue recognition which we scrapped half way through implementation. [1082]

Some features are not available for daily processing. [REDACTED] seems like a work in progress at times. Support **system** is slow through the Community response **system** and not through direct emails or phone calls. [1108]

Promoter

Text Explorer for Customer Relationship Questionnaire . RecommendComment Sentiment=Promoter

Number of Terms	Number of Cases	Total Tokens	Tokens per Case	Number of Non-empty Cases	Portion Non-empty per Case
752	829	3162	3.81423	216	0.2606

Term and Phrase Lists

Term	Count		Phrase	Count	N
product	53		product functionality	22	2
ease	37		ease of use usability	18	4
value	34		product functionality ease	18	3
functionality	28		functionality ease	18	2
easy	26		usability consistency	18	2
support	23		user friendly	18	2
great	22		customer service	12	2

Some comments



It is a great product and very user friendly. [796]

Implementation, product features, ease of use, ongoing updates, etc [849]

██████ is a very user friendly product [925]

Customer service is excellent. ██████ is always improving the product to meet the needs of it's clients. [978]

The product is excellent and the support services very good [1023]

The product is stable, reliable, and delivers a modern, efficient user interface. The API allows ██████ to integrate with best-in-class related products and services. [1077]

Excellent support, product update notification and ease of use of all modules. [1083]

great response time on customer service and ability to follow up on issues
also a great product to work with [1115]

The Product is very user Friendly and easy to train and teach on [1186]

Word Cloud - Day to Day vs. Decision Makers

Text Explorer for [redacted] Customer Relationship Questionnaire . RecommendComment

Number of Terms	Number of Cases	Total Tokens	Tokens per Case	Number of Non-empty Cases	Portion Non-empty per Case
1883	1471	12727	8.65194	461	0.3134

Day to Day

Term and Phrase Lists

Word Cloud

product reports functionality
use system user like support time customer
work accounting friendly one issues also company help
reporting many find invoices difficult just training better new way
easy great need service process report software go used adoption features
ability ease module see us well entry make needs value easier implementation much
order seems think transactions account day gl integration made vendor able changes
information times using create feel getting good things business change example steps still without year
ap customers even helpful invoice month multiple problem really takes usability want another ar back consistency
data different due entries every

Text Explorer for [redacted] Customer Relationship Questionnaire . RecommendComment

Number of Terms	Number of Cases	Total Tokens	Tokens per Case	Number of Non-empty Cases	Portion Non-empty per Case
1590	834	8461	10.1451	303	0.3633

Decision Makers

Term and Phrase Lists

Word Cloud

product system support
reports use implementation like us
functionality reporting customer process
time service ease value report able also need work
accounting company sales software still needs good team user
better help integration well ability difficult easy etc great new things
training way invoices many one dimensions make much really 3 adoption basic
best create features issue issues recommend think access ap excel feel financial flexible
inventory just made something usability ar bank business consistency custom easier end find
helpful invoice line months pay project solutions using approval change data different especially flexibility
improve month multi order party poor revenue

What might this mean?



- Product and functionality: Main issues for detractors
- Customer support and service - NOT a critical issue
 - Focus on analyzing product related comments for improvement
- Decision Makers are more concerned about support and service than Day to Day
 - Follow up with all Decision Makers and find out their reasons
- Are some customers the right fit?

Still, need more responses to conclude anything.

Recommendations

1. Increase response rate



- Keep the survey short and simple
 - 2-5 questions
 - Best practices: *Enterprise Rent-A-Car*
- Consider offering incentives
- Consider building the feedback system into the product: Best practices - *Concur*
- Close the loop: sending follow-up email after the NPS survey
 - Thank-you note
 - Acknowledgement of their score
 - Offer them something free – a discount, video or other download

2. Examine the comments



Systematically examine the survey comments

- Follow up and fix the issues they have
- Let them know and turn them into promoters
- Engage in competitive intelligence
- Analyze to see what type of customers are really the right fit

3. CSM vs. Account Manager



Consider separating CSM and Account Manager role.

Potential values of having CSM includes:

- Increasing response rate: customers are more likely to respond to CSM
- CSM = close relationships and receive real-time feedback
- AM = transactional relationship (upselling, renewals)
- CSM is a more analytical role - better understanding of data related to customer loyalty



Thank you for your attention

Q&A

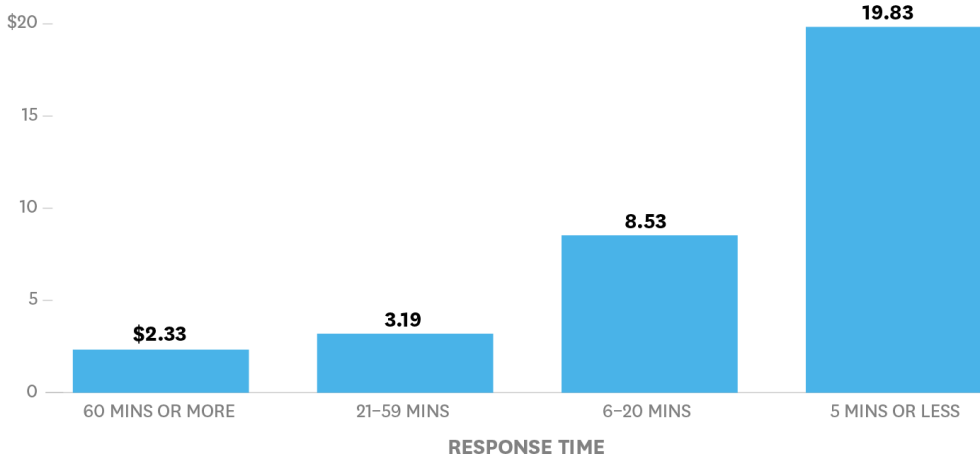
Appendix

The importance of follow-up email

Responding Quickly to Customer Complaints Makes People Willing to Pay More in the Future

A study of tweets to airlines shows that when a tweet is answered in five minutes or less, the customer will pay almost \$20 more for a ticket on that airline in the future.

ADDITIONAL AMOUNT WILLING TO PAY (\$U.S.)



SOURCE WAYNE HUANG ET AL.

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Article: [How Customer Service Can Turn Angry Customers into Loyal Ones](#)

Other resources



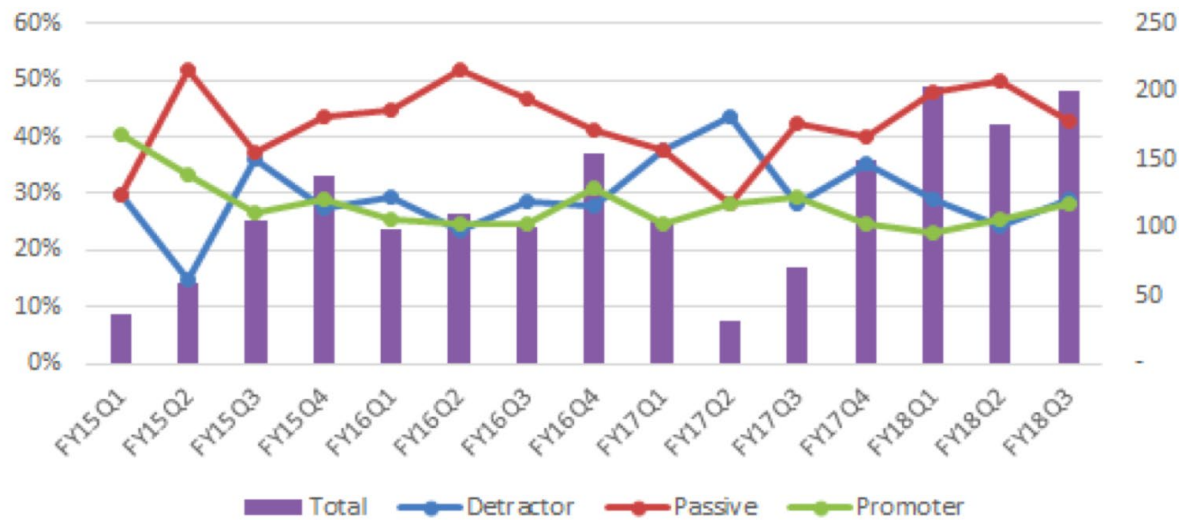
HBR Article: [The One Number You Need to Grow](#)

HBR Article: [Closing the Customer Feedback Loop](#)

Article: [The Five Differences Between An Account Manager and a Customer Success Manager](#)

Free Webinar by Gainsight: [How to Calculate Net Promoter Score to Get Deeper Customer Insights at Scale](#)

(1) Percentage of each sentiments among all one-time-respondent



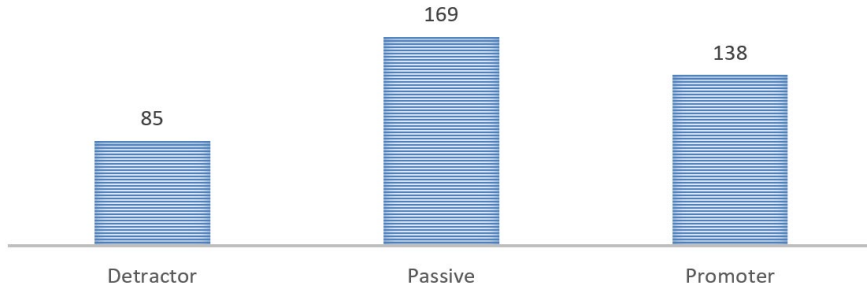
More-than-1-time respondent by sentiment



Count of Sentiment

NUMBER OF MORE-THAN-1-TIME RESPONDENTS
BY SENTIMENT

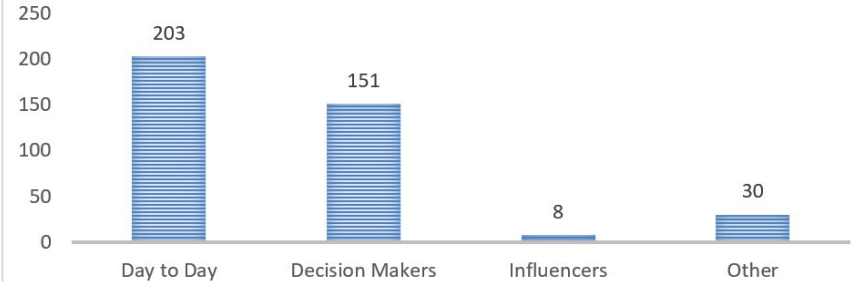
■ Total



Sentiment ▾

Count of Reconciled Role

MORE-THAN-1-TIME RESPONDENT
BY ROLE

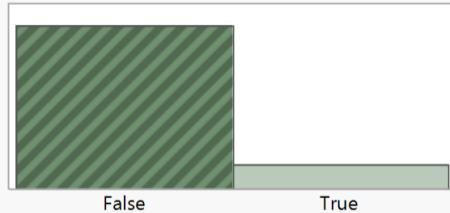


Reconciled Role ▾

Non-respondent by Segment

Distributions Segment=Emerging

Responded

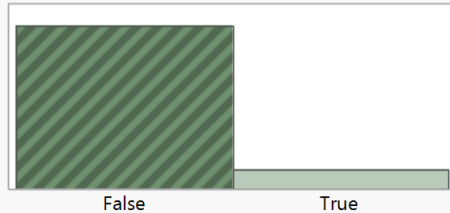


Frequencies

Level	Count	Prob
False	8153	0.87601
True	1154	0.12399
Total	9307	1.00000
N Missing		0
2 Levels		

Distributions Segment=Mid-Market

Responded

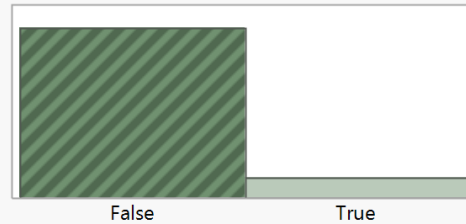


Frequencies

Level	Count	Prob
False	4082	0.90490
True	429	0.09510
Total	4511	1.00000
N Missing		0
2 Levels		

Distributions Segment=SMB

Responded

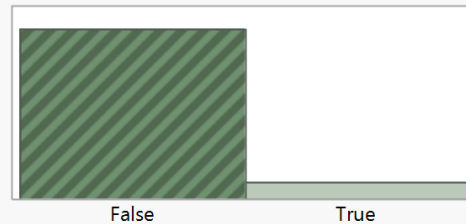


Frequencies

Level	Count	Prob
False	6767	0.89772
True	771	0.10228
Total	7538	1.00000
N Missing		0
2 Levels		

Distributions Segment=Strategic

Responded



Frequencies

Level	Count	Prob
False	3069	0.91667
True	279	0.08333
Total	3348	1.00000
N Missing		0
2 Levels		