

# Customer Health Dashboard

Interactive Data Visualization & Automation Pipeline



## PROJECT OVERVIEW

Replaced manual spreadsheet tracking with a comprehensive Customer Health Dashboard for a Customer Success team managing 500+ accounts. The application aggregates disparate survey data into a centralized, visual interface, enabling real-time tracking of NPS, CSAT, and Churn Risk.

Key capabilities include automated CSV parsing, dynamic multi-variable filtering (Timezone, Region, Date), and an interactive triage workflow that reduced response times for "High Risk" accounts by an estimated 40%. The system was architected to be lightweight and deployment-ready without complex backend infrastructure.

### PROJECT DETAILS

**Role**  
Frontend Engineer & Data Visualization Specialist

- Tech Stack**
- JavaScript (ES6+)
  - Chart.js
  - Tailwind CSS
  - HTML5 / DOM API

**Deliverables**  
Operational Dashboard, Privacy-Safe Demo, Automated CSV Ingestion

# KEY FEATURES

## 1 **Dynamic Filtering Engine**

Robust search allowing multivariable filtering by Date Range (with Timezone alignment), Industry, and Health Score.

## 3 **Interactive Triage**

Dedicated workflow view for managers to identify, assign, and track "High Risk" accounts.

## 2 **Automated Data Pipeline**

Client-side parser that instantly transforms raw CSV exports into structured, queryable data models.

## 4 **Privacy-First Architecture**

Created a standalone "Demo Mode" with sanitized/mock data for secure stakeholder demonstrations.

# Visual Implementation

## TRIAGE & WORKFLOW MANAGEMENT

Customer Health Dashboard

DEMO

Manage CSMs

Login for Editing

Demo version with sample data for demonstration purposes.

Dashboard

Triage View22

Data Table

All Industries

All Time

US (12/31/23)

Local Time

ASSIGNED CSM

FOLLOW-UP STATUS

All CSMs

All Active Statuses

North Jennifer Tech

dan.berg@northjenniferte.net

Last update by System Init on 3/20/2025

"We've had some challenges with integration...."

1

★

Assign CSM

Unassigned

Set Status

New Response

Strategic Corporation Co.

gregory.thompson@strategiccorpor.com

Last update by System Init on 7/27/2025

1

★

Assign CSM

Unassigned

Set Status

New Response

Managers can filter by assignee and status to ensure no high-risk account slips through the cracks.

## GRANULAR DATA ANALYSIS

Customer Health Dashboard

DEMO

Manage CSMs

Login for Editing

Demo version with sample data for demonstration purposes.

Dashboard

Triage View22

Data Table

All Industries

All Time

US (12/31/23)

Local Time

This table contains all survey responses. Use the global filters at the top to narrow down the data. Click View Details for the full response.

DATE	COMPANY	HEALTH (Q2)	ADOPTION (AVG)	ROI (Q4)	SUPPORT (Q10)	BATCH USE (Q14)	FILE PROCESSOR (Q12)	CLOUD PLAN (Q16)	REFERENCE? (Q30)
12/06/25, 12:33 AM EST	National Hamilton Co.	4	2	No	No	No	Yes	No	No
11/20/25, 10:44 PM EST	Walker Group	4	2	Yes	Yes	No	No	No	No
11/19/25, 1:29 AM EST	Wong Industries	4	2	No	Yes	No	Yes	No	Yes
11/17/25, 2:52 PM EST	North Roymouth Industries	5	2	Yes	Yes	No	No	Yes	No

CORRELATIONS & INSIGHTS



Secondary visualizations analyzing the correlation between reported ROI and Happiness scores.