

# Net Promoter Dashboard

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Company: Alight Solutions

**Tools:** Tableau, MS SQL Server

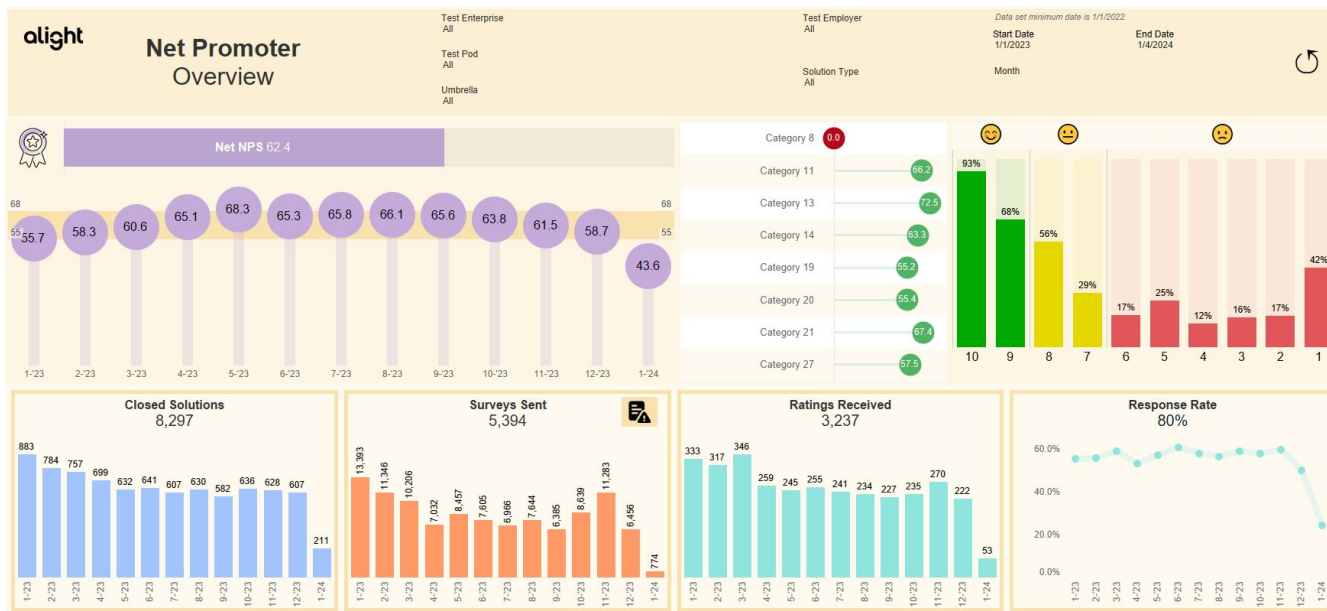
**Background:** The Navigation department at Alight Solutions used to report out of SSRS. For reporting on Net Promoter, there were 3 different SSRS reports, each with long run times and a history of user complaints regarding performance and ability to interactively slice-and-dice to generate insights. The SSRS reports were also pretty basic, tabular reports, which did not make it easy to visualize data trends. The Navigation department prioritized an initiative to migrate SSRS content Tableau for a better user experience and generate insights more quickly. In this effort, I worked with operational and product leads to define requirements, design a new flow of information, build data structures in SQL to support a dashboard and constructed a visually stunning dashboard.

On the dashboard, you can find an overview page, trend by employer (Alight's clients are employers), Agent (Alight employees who work with employer members on healthcare guidance solutions) and a details table.

This was also one of the first dashboards in a SSRS > Tableau migration. I built this to demonstrate Tableau capabilities, illustrate our direction with dashboarding and training my direct reports on design/Tableau functionality. I also learned Tableau in under 1 month and unleashed some advanced features within the first release.

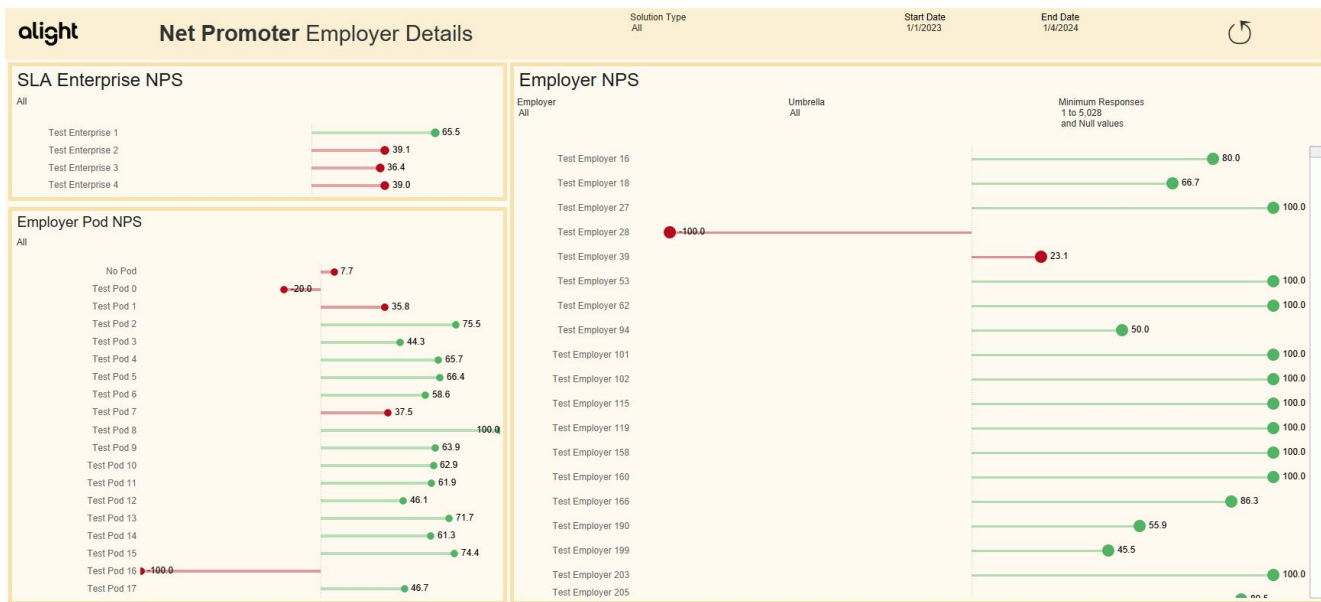
# Overview Page

- Trend total NPS by any date granularity you select at the top (Day, Week, Month, Quarter, Year)
- Breakout of NPS by Solution Category (understand the performance by service type)
- Breakout of NPS by individual NPS rating
- Trends for closed solution volume, surveys sent (plus toggle feature to display survey not sent reason breakouts), ratings received and response rate
- Interactivity – clicking on a visual like NPS overtime will cross-filter on breakouts by score and solution type. Users can also click on groupings to drill into details



# NPS By Employer

- See NPS breakouts by employer, SLA enterprise (client service lines), and employer Pods (how employers are grouped internally)
- Isolate employers based on volume of survey responses. This could be a good way to see which employers have the best experiences if we isolate high volume accounts.
- Drill into details by selecting any category



# NPS By Agent

- For internal performance tracking, users can visualize NPS by Manager, lead and agent. NPS can also be broken out by an agent's role on a solution (i.e if they triaged, researched or served as primary communicator)
- Again, drill into details by clicking on any member, lead or manager

alight Net Promoter Agent Details									
Test Manager	Test Senior	Test Health Pro	Triager NPS	Researcher NPS	Communicator NPS	Overall NPS	Solution Vol.	Start Date	End Date
XXXX	XXXX	Test Agent 2465	70	36	57	55	209	1/1/2023	1/4/2024
		Test Agent 2563	87	82	76	74	193		
		Test Agent 2672	77	77	68	70	272		
		Test Agent 2728	90	68	83	78	270		
		Test Agent 3010	85	55		60	89		
	XXXX	Test Agent 1142			100	100	1	Test Manager All	
		Test Agent 1298	71	79	43	67	77		
		Test Agent 2522	87	82	75	75	241		
	XXXX	Test Agent 296	77	57	42	46	36	Test Senior XXXX	
		Test Agent 784	50	46		49	70		
		Test Agent 2344	52	71		48	60		
		Test Agent 2345	41	25		38	44		
		Test Agent 2346	32	35		31	92		
		Test Agent 2349	57	59		54	49		
		Test Agent 2537	45	45		43	74		
	XXXX	Test Agent 2572	100			100	1	Test Health Pro All	
		Test Agent 2574	100			100	5		
		Test Agent 2580	100			100	2		
		Test Agent 2583	0			0	1		
		Test Agent 2833	-50			-50	4		
	XXXX	Test Agent 501		40		40	5		
		Test Agent 3022		33		33	3		
	XXXX	Test Agent 473	14	44	100	38	51		
		Test Agent 605	17	12	-50	7	45		
		Test Agent 788	53	46	78	53	15		
		Test Agent 832	90	63	-100	73	11		
		Test Agent 964			50	50	10		
		Test Agent 1102	27	50	50	41	22		
		Test Agent 2687	0	33	100	33	39		
	XXXX	Test Agent 1577	80	45	63	62	140		
		Test Agent 2748	100	84	50	82	39		
		Test Agent 2986	76	82	0	81	60		
		Test Agent 3012	100	71		74	38		
		Test Agent 3147		100		100	9		

# NPS Survey Details

- Displays key information about a survey and allows a user to jump into the solution directly to investigate further
- For initial performance throttling, 25 records are loaded at a time with an option to page through results. Users can choose X number of records to load at a time or even all records.

alight

Net Promoter Survey Details

Show Records25

Page Number1

Ratings from 1,458 solutions

SLA EnterpriseAll

Employer PodAll

UmbrellaAll

Test EmployerAll

Solution TypeAll

Start Date1/1/2023End Date1/4/2024

Rating CategoryAll

RatingAll

Test Health ProAll

Agent RoleAll

Test Solution IDAll

Test EmployeeAll

Row	Test Solution ID	Rating Date	Test Employer	Test Pod	Test Employee	Solution Type	Test Triager	Test Researcher	Test Communicator	Test Comment	Rating	
1	147803	1/11/2023	Test Employer 6554	Test Pod 5	XXXX	Category 11	XXXX	XXXX	XXXX	XXXX	5	
2	148563	2/16/2023	Test Employer 6577	Test Pod 1	XXXX	Category 11	XXXX	XXXX	XXXX	XXXX	7	
3	148896	7/21/2023	Test Employer 1571	Test Pod 11	XXXX	Category 11	XXXX	XXXX	XXXX	XXXX	10	
4	148983	3/25/2023	Test Employer 5117	Test Pod 15	XXXX	Category 11	XXXX	XXXX	XXXX	XXXX	9	
5	149037	2/1/2023	Test Employer 3094	Test Pod 11	XXXX	Category 11	XXXX	XXXX	XXXX	XXXX	10	
6	149085	1/25/2023	Test Employer 5770	No Pod	XXXX	Category 11	XXXX	XXXX	XXXX	XXXX	10	
7	149172	2/3/2023	Test Employer 5770	No Pod	XXXX	Category 11	XXXX	XXXX	XXXX	XXXX	9	
8	149385	1/3/2023	Test Employer 5117	Test Pod 15	XXXX	Category 11	XXXX	XXXX	XXXX	XXXX	7	

# Outcomes/Reactions

- Reports that averaged >100 seconds to retrieve results in SSRS are now available in seconds in Tableau. Data is loaded every morning via extracts, and the dashboard is designed tactfully to balance performance with user needs.
- Over 50 daily users within the first 3 weeks of release.
- “This is a gamechanger for me. I go into this every day and I can learn some much more than I could with my previous, static reports” – Senior Manager in Operations
- “Could we have Udbhav and his team build dashboards for us, too?” – manager in a separate division at Alight
- “I see that we are being really mindful and strategic with our Tableau migration. Really impressed by the results, thank you!!” – VP of Operations