Executive Summary

In response to declining sales and customer satisfaction, the World-Wide Widgets Marketing and Sales teams have partnered to create a Customer Satisfaction and Retention Survey. This document details the Customer Satisfaction and Retention Survey dashboard which is a visual representation of the survey results.

Background

Beginning in late 2015, the Sales team has struggled to make their targets. Anecdotal feedback from personnel in the field indicated the declining sales were due, at least in part, to declining satisfaction on the part of customers. At the request of the VP of Sales and Marketing, the Marketing team, in conjunction with the Sales team has formed a new Customer Satisfaction team. The new team initiated a program of monthly customer surveys to collect information on customer sentiment, evaluate that information, and perform follow-up customer contact as needed. This dashboard is a visual representation of data. Data are updated nightly as part of the daily IT batch processing. The dashboard is intended as a tool for the VP of Sales and Marketing who is the Executive Sponsor and the Directors reporting to him.

Project Details

Methodology

Within 30 days of a purchase, all customers receive a phone call from a member of the Customer Satisfaction team. The customer is asked a series of standardized questions about their purchase. Responses are on a 1 – 10 scale where 10 is a strong positive response, and 1 a strongly negative reaction. The target established for Customer Satisfaction is an average of 8.0 across all members surveyed in a 30-day period. The 8.0 target was selected since industry studies show an 8.0 satisfaction level practically ensure repeat purchases, and retention of customers.

Questions and KPIs

Each Key Performance Indicator (KPI) on the dashboard supports a specific question asked by the Executive Sponsor regarding customer sentiment.   The questions of interest are listed below, with the measurement and visualizations used on the dashboard.

➢ *Question: How is satisfaction with World-Wide Widgets trending?*
- KPI: Survey scores for the "standard 3 measures": Overall Satisfaction, Likelihood to Buy Again, and Likelihood to Recommend World-Wide Widgets.
- Visualization: Chart of the results of the surveys from the last 30 days, by Customer, showing their Overall Satisfaction rating, likelihood of buying again, and likelihood of recommending World-Wide Widgets. scores. An average line of scores for the period and target line are included for reference.

➢ *Question: Are our customers more, or less satisfied with us than they were a year ago?*
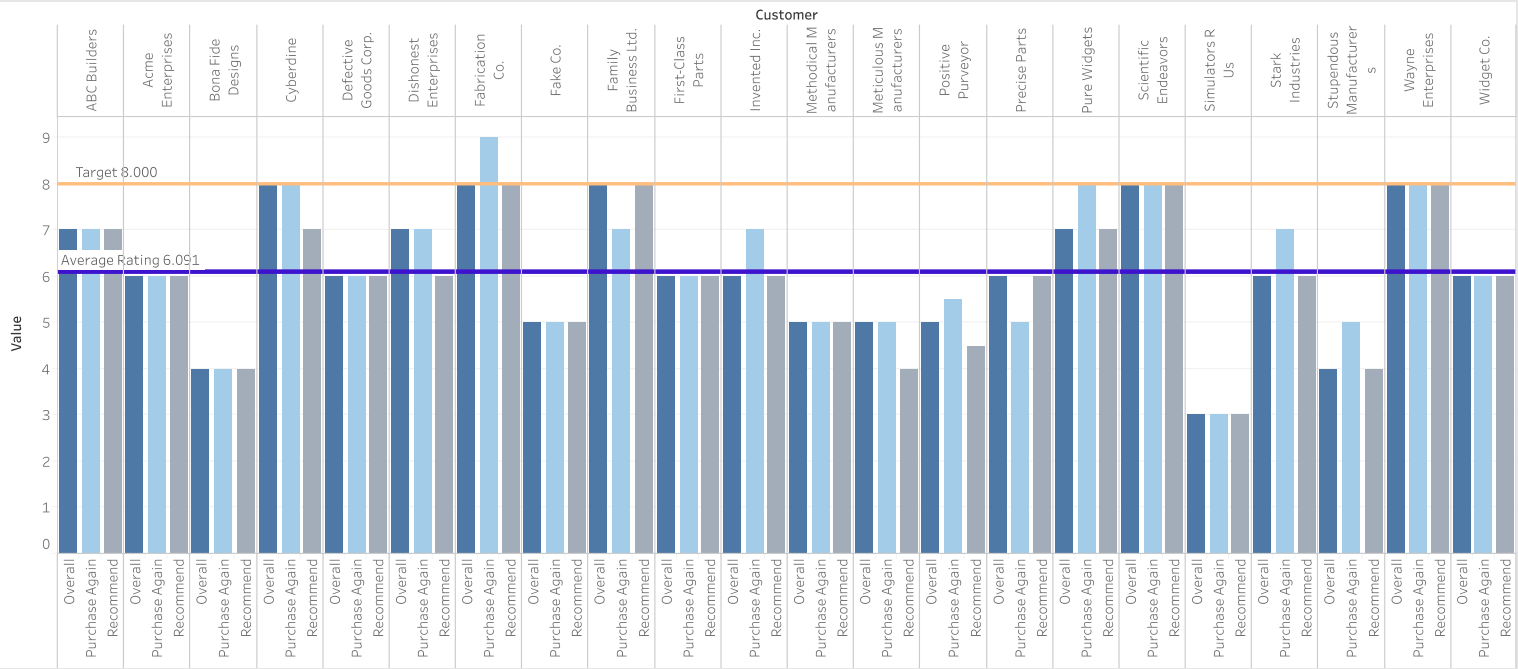- KPI: Compare Customer's most recent score to prior score, yielding a +/- number for change in sentiment
- Visualization: For Customer surveys done in the last 30 days, chart the score +/- value by Customer

➢ *Question: How does the current average satisfaction level compare to the past? Are there long-term trends?*
- KPI: Average Overall satisfaction by fiscal quarter
- Visualization: Chart average by month, grouped by quarter, for the past 12 months, includes an 8.0 target line and quarterly trend lines for reference

➢ *Question: Can we spot Customers at risk of switching suppliers, so we can reach out to mitigate?*
- KPI: Over the last 60 days, which Customers have an Overall satisfaction number at or below 5.0. Metrics from the Sales team indicate 5.0 is the threshold at which a customer is likely to switch Widget suppliers.
- Visualization: Heat map of Customers at or below 5.0 in Overall Satisfaction surveyed in the period.

➢ *Question: Are satisfaction results consistent across Widget types, or are there differentiators that impact satisfaction?*
- Primary – Standard 3 Measures, by type of widget
  - KPI: For each Widget type, assess the standard 3 satisfaction numbers over the last 60 days
  - Visualization: Chart standard 3 measures with target line for reference
- Secondary – Widget Attributes
  - KPI: Customer Satisfaction with the Design, Quality and Price-Value for each type of widget over the last 60 days
  - Visualization: Chart the satisfaction measures of the Attributes, along with a target reference line
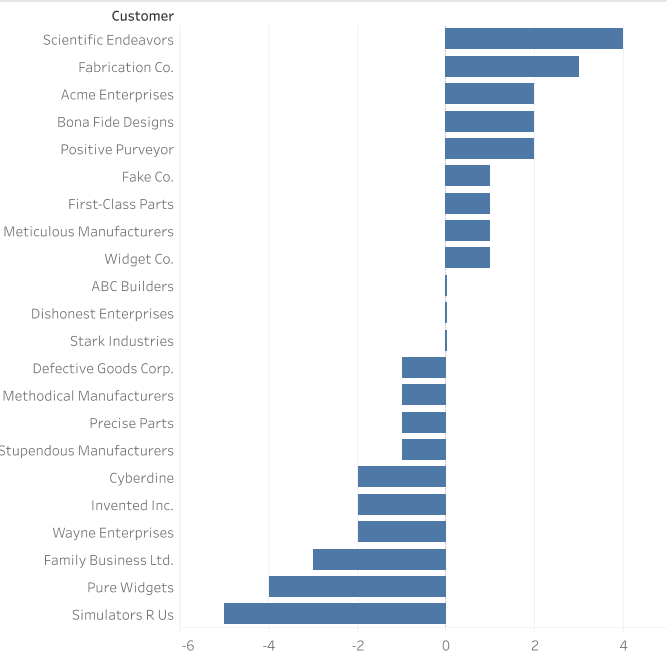
Customer Satisfaction and Retention Survey Results Dashboard   -- Last Updated: 2/5/17
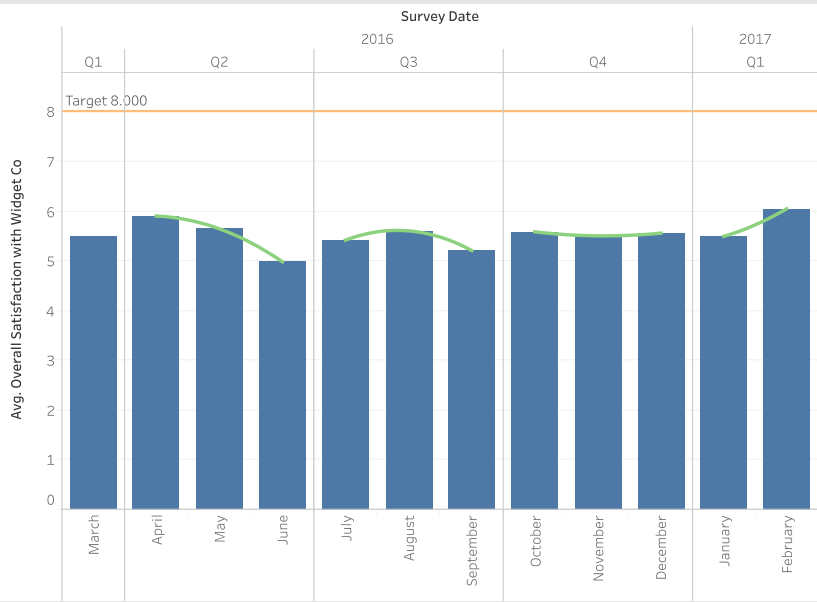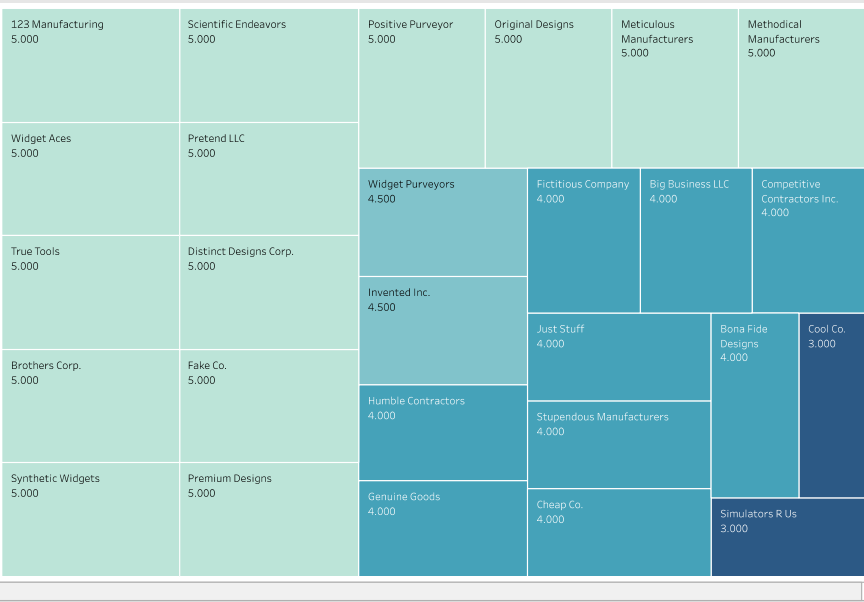
Customers surveyed in the last 30 days

Customer

ABC Builders | Acme Enterprises | Bona Fide Designs | Cyberdine | Defective Goods Corp. | Dishonest Enterprises | Fabrication Co. | Fake Co. | Family Business Ltd. | First-Class Parts | Invented Inc. | Methodical Manufacturers | Meticulous Manufacturers | Positive Purveyor | Precise Parts | Pure Widgets | Scientific Endeavors | Simulators R Us | Stark Industries | Stupendous Manufacturers | Wayne Enterprises | Widget Co.

Target 8.000

Average Rating 6.091

Value: 9, 8, 7, 6, 5, 4, 3, 2, 1, 0

Overall / Purchase Again / Recommend (repeated per customer)

Surveyed last 30 days +/- rating vs last year

Customer

- Scientific Endeavors
- Fabrication Co.
- Acme Enterprises
- Bona Fide Designs
- Positive Purveyor
- Fake Co.
- First-Class Parts
- Meticulous Manufacturers
- Widget Co.
- ABC Builders
- Dishonest Enterprises
- Stark Industries
- Defective Goods Corp.
- Methodical Manufacturers
- Precise Parts
- Stupendous Manufacturers
- Cyberdine
- Invented Inc.
- Wayne Enterprises
- Family Business Ltd.
- Pure Widgets
- Simulators R Us

-6   -4   -2   0   2   4

Overall ratings for the last 12 months

Survey Date

2016: Q1, Q2, Q3, Q4 | 2017: Q1

Target 8.000

Avg. Overall Satisfaction with Widget Co

8, 6, 4, 2, 0

March, April, May, June, July, August, September, October, November, December, January, February

Surveyed in the last 60 days - Customers at risk

| 123 Manufacturing 5.000 | Scientific Endeavors 5.000 | Positive Purveyor 5.000 | Original Designs 5.000 | Meticulous Manufacturers 5.000 | Methodical Manufacturers 5.000 |

| Widget Aces 5.000 | Pretend LLC 5.000 | Widget Purveyors 4.500 | Fictitious Company 4.000 | Big Business LLC 4.000 | Competitive Contractors Inc. 4.000 |

| True Tools 5.000 | Distinct Designs Corp. 5.000 | Invented Inc. 4.500 | Just Stuff 4.000 | Bona Fide Designs 4.000 | Cool Co. 3.000 |

| Brothers Corp. 5.000 | Fake Co. 5.000 | Humble Contractors 4.000 | Stupendous Manufacturers 4.000 | | |

| Synthetic Widgets 5.000 | Premium Designs 5.000 | Genuine Goods 4.000 | Cheap Co. 4.000 | Simulators R Us 3.000 | |

Satisfaction by Widget type - last 60 days

Widget: Widget A, Widget B, Widget C

Value: 8.0000, 6, 4, 2, 0

Overall / Purchase Again / Recommend (per widget)

Attribute ratings by Widget type - last 60 days

Widget: Widget A, Widget B, Widget C

Value: 8.000, 6, 4, 2, 0

Design / Price Value / Quality (per widget)