

Survey Monkey & Power Bi NPS Solution Presentation for CDAO – West By Scott Olson

Problem Statement

- We conduct customer (we call them members) NPS surveys each time a member visits one of our physical branches or calls into our call center to facilitate a transaction.
- Before 2019 we would send a marketing company a list of emails along with account info so that they could send out NPS surveys and report back the results.
- Results would be collected by the marketing company and once a month (typically in the middle of the month after they were collected) would send the results in a spreadsheet.



Problem Statement

- Our Operations Department would then have to filter the results to determine the NPS average for the organization and for each branch.
- Incentives were paid to our Tellers so they would also have to total those individual results to get the bonus calculation into their next paycheck.
- For this, CoastHills FCU was spending \$40,000 a year and results were difficult to parse based on the spreadsheet data.



Problem Defined

- Took too long to get surveys out
- Took too long to get surveys back.
- Too much manual calculation to derive analytics – Branch Operations spent a full day each month generating summary and basic analytics
- Cost was prohibitive

Solution

- Survey Monkey had a certified NPS survey that we could build on. It also had a Power Bi integration so that we could automate results and analytics
- The basic survey has the NPS question that provides results even if respondent just answer this one question (something that wasn't possible before) and here are the 5 Perfect Score Questions

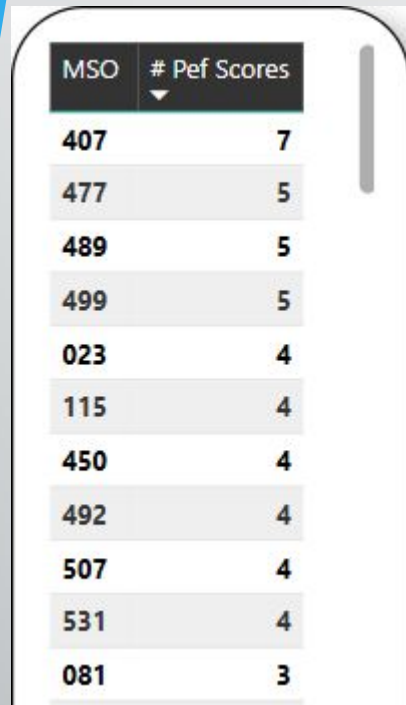
On a scale of 1-5 (with 5 being the best)

1. Was the service wait time reasonable for your visit
2. Was the transaction completed accurately
3. Did employee offered solutions meet your needs
4. Was the employee professional
5. Was the customer service satisfactory

Solution Benefits

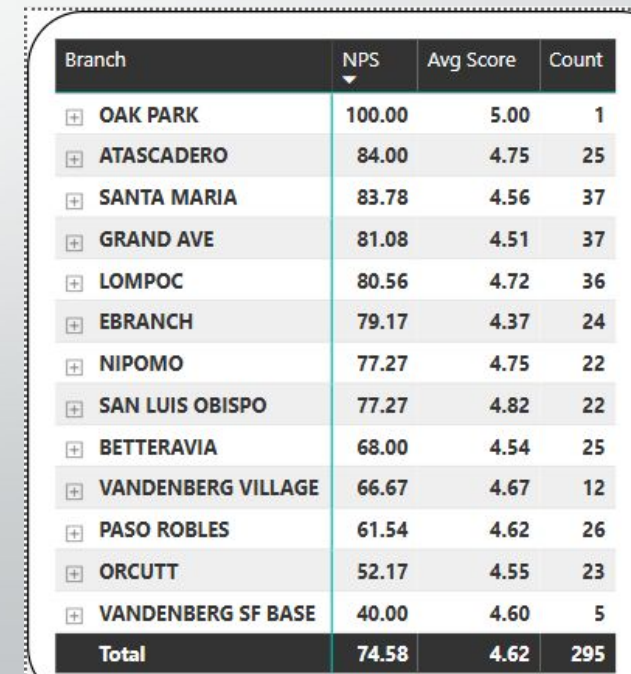
- Two or three times a week, our Operations Department gets daily files of those who visited a branch the day before.
- Those files are uploaded to Survey Monkey and sent out.
- Results are automatically loaded into the Survey Monkey system as they come in and then analyzed via Power Bi integration – automated
- Data is summarized at an organizational, branch and teller level for our NPS and Perfect Scores and their averages.
- What used to take a month and a half to see, is now being viewed in near real-time.

Solution Benefits



MSO	# Perf Scores
407	7
477	5
489	5
499	5
023	4
115	4
450	4
492	4
507	4
531	4
081	3

- Based on this data (image to the left), the Branch Operations team can select an individual month and automatically see who attained the necessary level for bonus (in this case its 5 perfect scores in a month)
- Any branch that gets 70 or more (image to the Right) as an NPS Average for the month also gets a bonus for their staff.



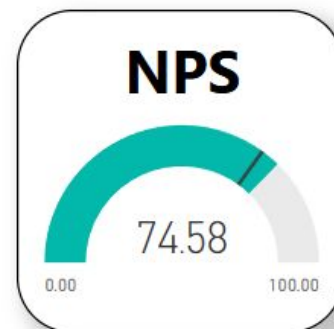
Branch	NPS	Avg Score	Count
⊕ OAK PARK	100.00	5.00	1
⊕ ATASCADERO	84.00	4.75	25
⊕ SANTA MARIA	83.78	4.56	37
⊕ GRAND AVE	81.08	4.51	37
⊕ LOMPOC	80.56	4.72	36
⊕ EBRANCH	79.17	4.37	24
⊕ NIPOMO	77.27	4.75	22
⊕ SAN LUIS OBISPO	77.27	4.82	22
⊕ BETTERAVIA	68.00	4.54	25
⊕ VANDENBERG VILLAGE	66.67	4.67	12
⊕ PASO ROBLES	61.54	4.62	26
⊕ ORCUTT	52.17	4.55	23
⊕ VANDENBERG SF BASE	40.00	4.60	5
Total	74.58	4.62	295

Additional Benefits

- Survey Monkey has a setting for those who give a negative NPS score (anyone submitting 6 or less on 10-point scale). - to auto forward response.
- Responses are sent to the branch manager where transaction occurred. then that member is immediately called to better understand and if possible, correct any negative interaction—keeping our service promise.
- The system also mines all the positive NPS scores (9 or 10) and creates a new email list that also has what branch they visited.
- Marketing then sends that list an email with a built-in link to the Google Business Profile landing page for the Branch they gave a great NPS score to. This assists us in building positive reviews per location.

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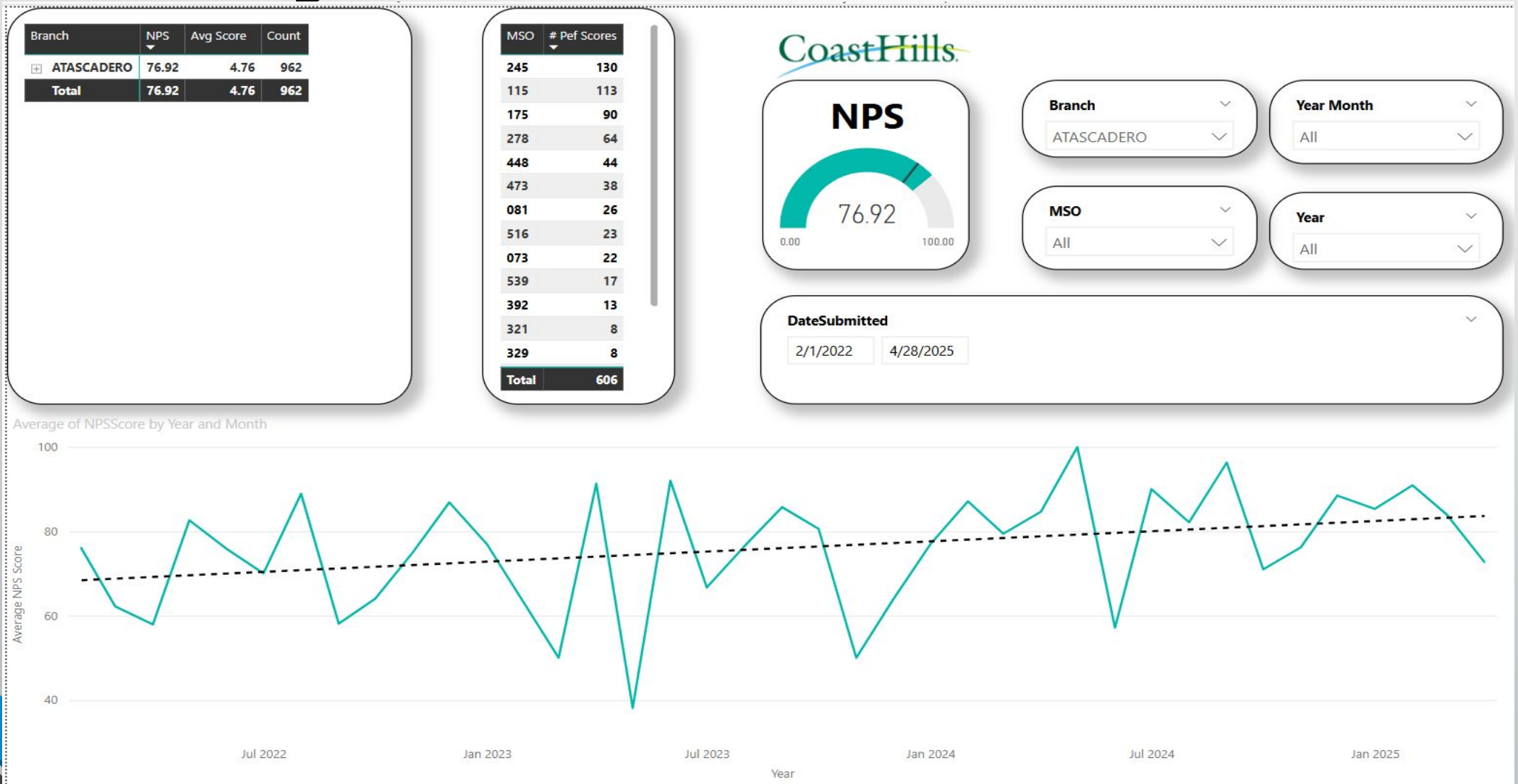
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531	4
081	3
359	3
497	3
Total	139

BranchAllMSOAllYear Month2025 MarYearAll[illegible]

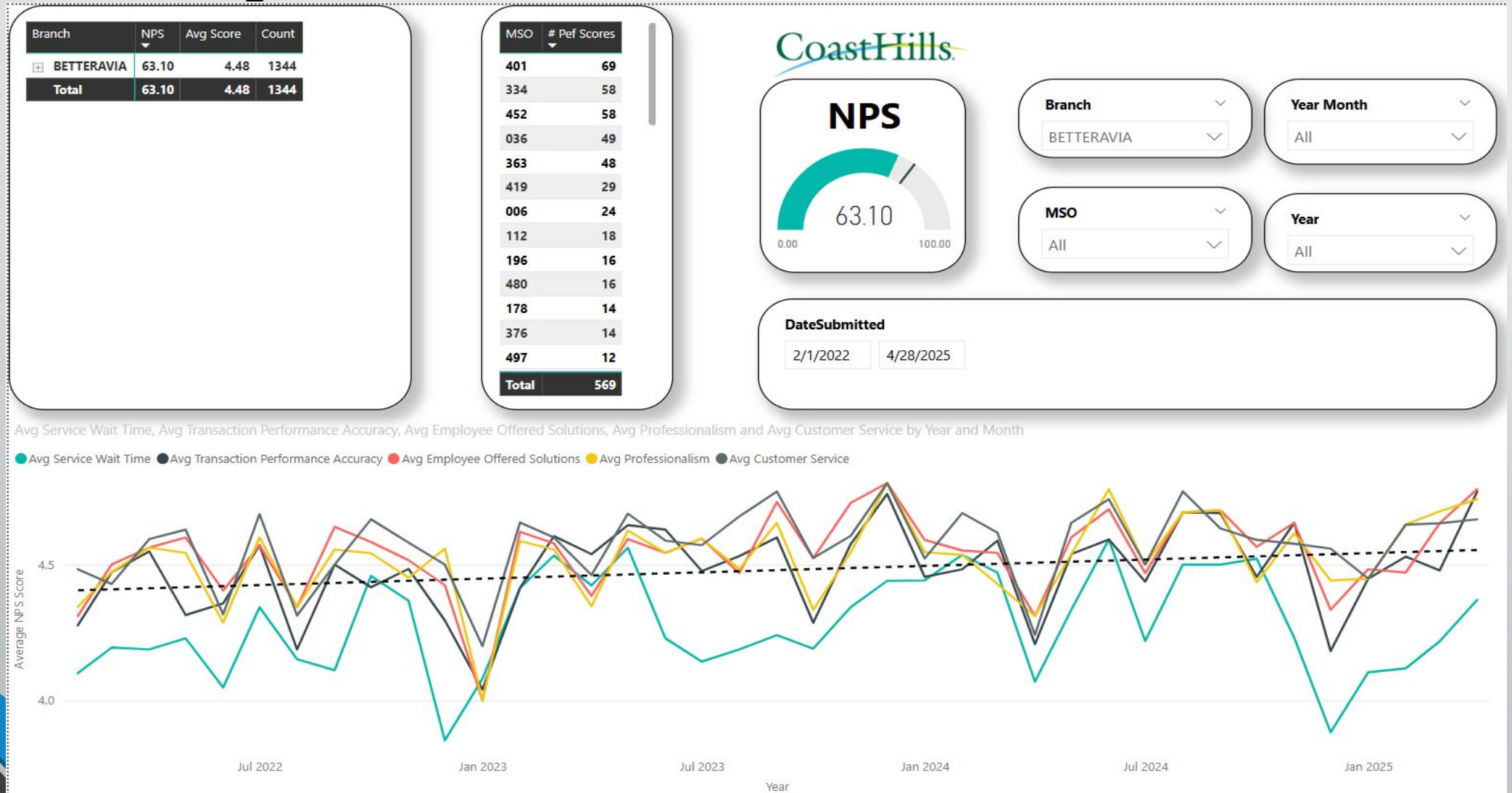
Solution Defined

- Before -- Took too long to get surveys out
- NOW – Surveys sent out daily (via automation API Integration in 2025)
- Before -- Took too long to get surveys back
- NOW – Surveys are received in near real time
- Before -- Too much manual calculation to derive analytics
- NOW – Survey data summarized automatically via Power Bi Integration
- Before Cost of \$40,000 yearly
- NOW -- The Survey Monkey Solution costs \$13,000

Analytics – Branch Trends



Analytics – Perfect Score Trend



Questions?

- Iterative process, the final solution has been refined several times over past 6 years and we just recently integrated Survey Monkey API to get files sent out daily via automation
- This solution won an award from Survey Monkey in 2019 – mostly based on our Power Bi integration which they were highlighting at the time.