

Customer Experience and Feedback Analysis

(Power BI Template App)

Help Document

Customer Experience & Feedback Analytics

PowerBI Template App

Overview

Customer Experience & Feedback Analysis Dashboard is a Power BI Template App designed to empower business owners understand their customers.

The report enables organizations to assess how their products and services are being received, adopted and perceived by their customers and quantify their understanding using key industry standard Customer Experience (CX) metrics such as **Customer Satisfaction Rate (CSAT)** and **Net Promoter Score (NPS)**.

Below are few App features and capabilities:

- Connect to data sources that store customer feedback data from surveys and questionnaires.
- Monitor trends for Customer Experience (CX) metrics that support dynamic period controls (Month/Quarter/Year).
- Gain performance and statistical insights based on selected time periods for CX metrics.
- Compare CX metric performance against organizational goals and targets.
- Analyze CX metric performance across business dimensions (E.g. Channels, Products, Geographies etc.)
- Conduct root cause analysis to identify factors influencing customer experience by integrating organizational process/quality data.

This Business Intelligence solution built with features and capabilities highlighted above can be used by business owners to gather crucial insights and make informed, data-driven decisions. Insights from root cause analysis views can aid continuous improvement and help sustain a competitive edge in the market. Organizations of all sizes will find this Template App highly beneficial, as it significantly reduces the time and effort required for developing data models and designing dashboard UX.

Note:

- Power BI Pro License is required to install Power BI Template App.
- [Customer Experience & Feedback Analytics](#) Template App uses Power BI native connector for SQL Server Database.
- AppSource version of [Customer Experience & Feedback Analytics](#) Template App is full read only version. (Data Model, DAX Measures, M Code and Report Visuals cannot be modified or edited).
- To customize the App, please visit <https://quartilebi.com> to check out purchase options of PBIX File associated with the [Customer Experience & Feedback Analytics](#) Template App. After purchase you have full ownership of the report file which will enable you to customize and modify Semantic Model, DAX Codes, M Codes and other report elements.

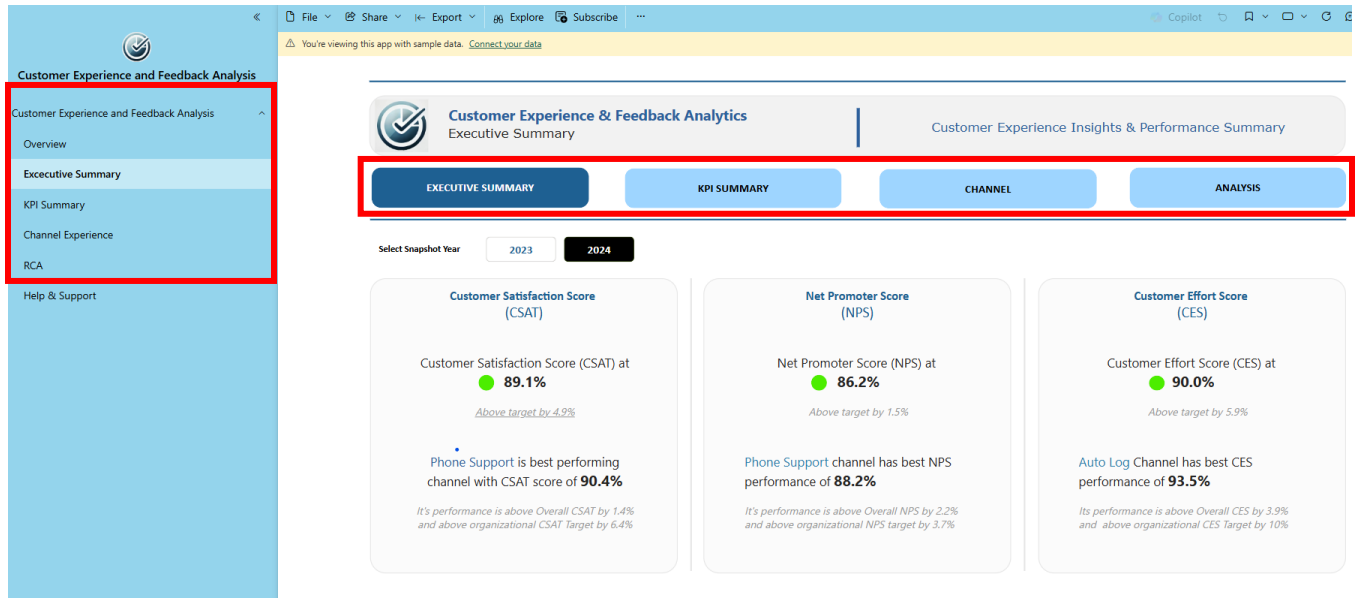
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User Interface and Navigation

Users can explore the app by navigating using both.

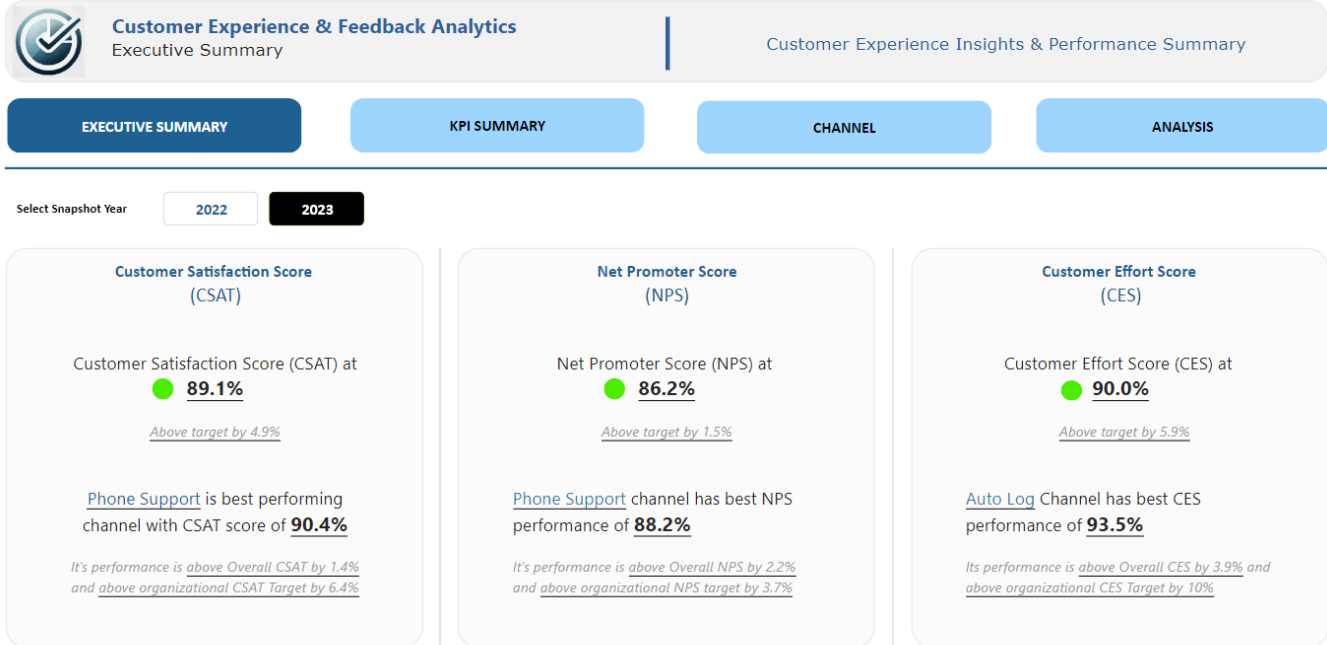
- Report pages on the left pane.
- Tabs present in report canvas.



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Executive Summary

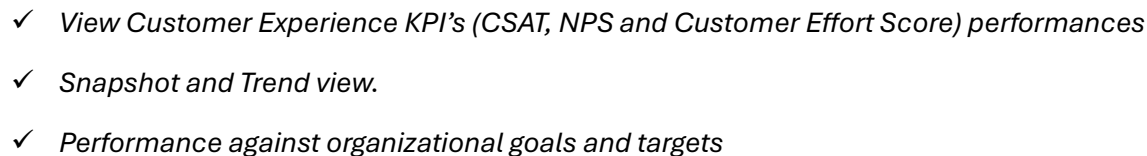


- ✓ Narratives generated using built-in logic.
- ✓ CX KPI performance and insights updated dynamically with data update and refresh.

The **Executive Summary** page features automatically generated narratives for three key Customer Experience Metrics: CSAT, NPS, and CES, presented in two distinct components for the selected snapshot year:

- **Year-to-Date Performance Analysis**
This component highlights the Year-to-Date (YTD) score for each metric, comparing it against the organization's target. It also indicates the percentage by which the score has exceeded or fallen short of the target. For additional details, refer to the **Target** section in the help document.
- **Best-Performing Business Dimension**
This component provides insights into the best-performing business dimension (e.g., channel) for the specified Customer Experience Metric. It also illustrates how the dimension's performance compares to the overall metric performance and the organizational target. For further information, see the **Target** section in the help document.

KPI Summary



- **Time Intelligence Insights**
This section provides detailed performance metrics such as Year-to-Date (YTD), Quarter-to-Date (QTD), Year-on-Year (Y/Y), and Quarter-on-Quarter (Q/Q) scores for the selected snapshot quarter. It also evaluates performance against the organizational target, indicating the percentage by which the target was exceeded or missed. For additional details, refer to the Target section in the help document.
- **Trend Analysis**
This section showcases the trend performance of each Customer Experience Metric. Users can customize the trend visualization by selecting their preferred X-axis—Year, Quarter, or Month—using the **Select Trend Axis** feature.

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Business Dimension



- ✓ Business Dimensional Analysis
- ✓ Compare KPI and Metric across relevant and important dimensions.
- ✓ Snapshot and Trend view.

The **Business Dimension** page offers valuable insights into the three Customer Experience Metrics—CSAT, NPS, and CES—analyzed from a business or organizational perspective.

For instance, the **Customer Experience and Feedback Dimension** leverages the "Contact Channel" as a business dimension, representing the channels customers use to contact the organization for product or service support. This dimension provides insights into the performance of Customer Experience metrics (CSAT, NPS, and CES) by channel, helping users identify which channels deliver the best customer experience and which require improvement. The report is structured into two sections:

Time Intelligence Insights

This section presents key performance metrics such as Year-to-Date (YTD), Quarter-to-Date (QTD), Year-on-Year (Y/Y), and Quarter-on-Quarter (Q/Q) scores. It evaluates performance against organizational targets, highlighting the percentage by which targets were exceeded or missed. For further details, refer to the **Target** section in the help document.

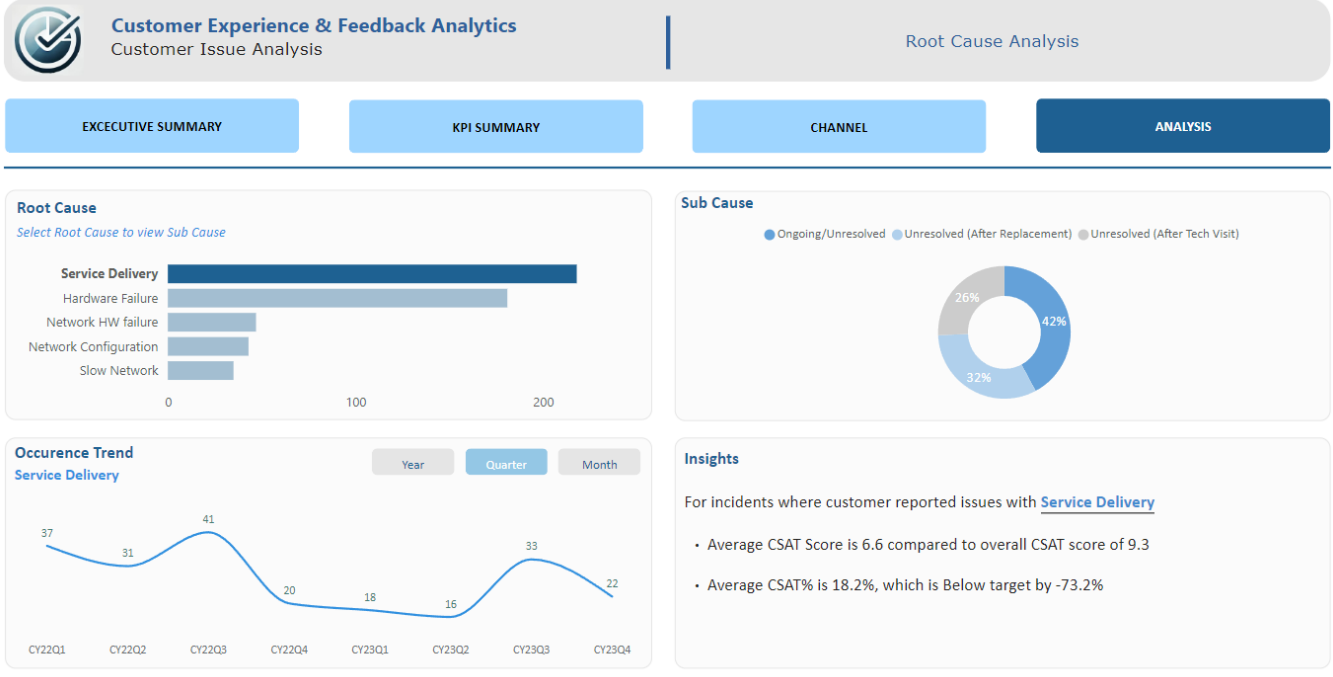
Comparative Trend Analysis

This section allows users to compare metrics side by side by adding them to a trend chart using the **Add KPIs to Compare** feature. Users can also customize the trend analysis by selecting the X-axis to display trends by Year, Quarter, or Month through the **Select Trend Axis** option.

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Root Cause Analysis



- ✓ Identify Problem Areas & Pain Points
- ✓ Narrow down underlying factors influencing customer experience.
- ✓ Monitor emergence of new customer reported Problem Areas
- ✓ Quantify impact of Problem Areas on Customer Experience metrics performance.

The **Issue Analysis** or **Root Cause Analysis** page elevates analytics by integrating quality control data to identify the top issues (problem areas) faced by customers and breaking these down into specific pain points for deeper insights.

This report combines survey and feedback response data with quality control data, offering insights into top issue trends. It also highlights the Customer Satisfaction (CSAT) scores associated with each issue, comparing them against organizational targets. This integration helps quantify the severity of each issue and supports data-driven decision-making for targeted improvements.

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Data Source and Data Tables Used

Component	Description	Key Features/Details
Database	SQL Server (Azure)	Used as the primary database platform for storing and managing data.
Survey Response Raw Data Table	Table to store raw data of customer survey responses.	Storage Options: Azure SQL, SQL Server, Excel, or any RDBMS.- Key Fields and Data Types: Used to develop Customer Metrics KPIs for the Customer Experience and Feedback Analytics App. - [Incident ID] [int] NULL - [Survey Submit Time] [datetime] NULL - [Entry Point] [nvarchar] (255) NULL - [Q1-CSAT] [float] NULL - [Q2-CES] [float] NULL
Date Table	Table to enable Time Intelligence.	Purpose: Facilitates YTD, QTD, Y/Y, Q/Q, and trend views.- Creation Method: Source table or generated using DAX (Calendar()).
RCA Table	Table used for root cause analysis, generated by the quality team.	Requirements: Must include an identifier field to map/relate with both the Survey Response Raw Data Table and Date Table .- Purpose: Provides insights by analyzing customer comments from surveys.

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Survey Rating Scale

The **Customer Experience & Feedback Analytics App** highlights key industry-standard metrics:

- **Customer Satisfaction Rate (CSAT)**
- **Net Promoter Score (NPS)**
- **Customer Effort Score (CES)** (*also referred to as Ease of Use*)

These metrics are derived from customer ratings on a 0 to 10 scale, where:

- **0** represents *Extremely Dissatisfied*
- **10** represents *Extremely Satisfied*

To support data analysis, the 0 to 10 rating scale is segmented into three categories:

1. **SAT** (Satisfied)
2. **MID** (Neutral/Mid-range)
3. **DSAT** (Dissatisfied)

This categorization forms the basis for logical profiling and metric calculations.

10	9	8	7	6	5	4	3	2	1	0
SAT		MID				DSAT				

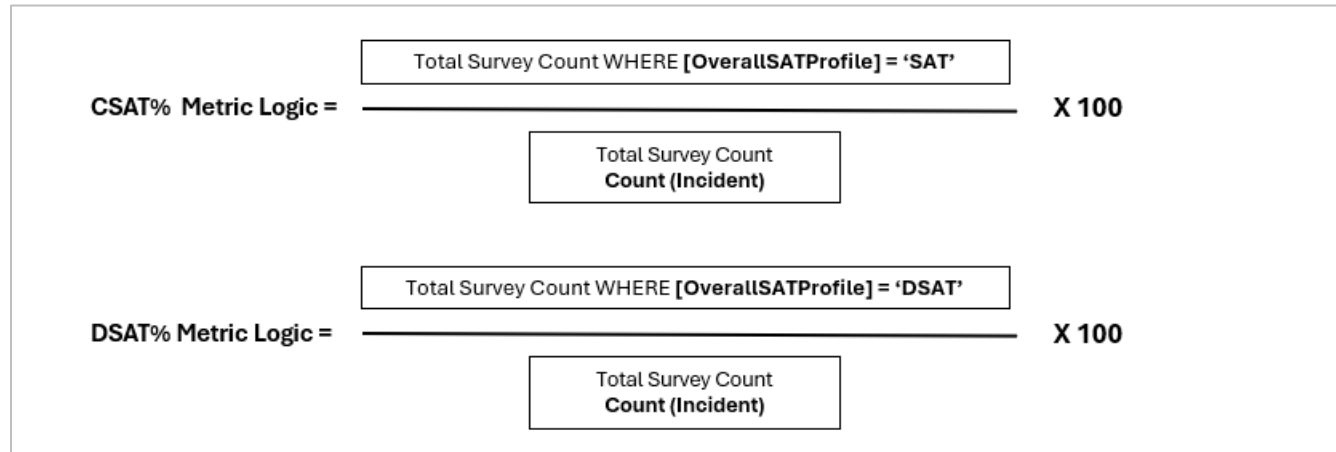
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Metric Logic

Customer Satisfaction Rate (CSAT%)

Definition: CSAT (Customer Satisfaction Rate) is a measurement used to quantify the degree to which customers are satisfied with a service or a product. For example, in this case, it measures percentage of customers who rate 9 & 10 for the question such as *“How would you rate your overall experience of the product/service?”*. The rating is captured under field ‘Q1-CSAT’.



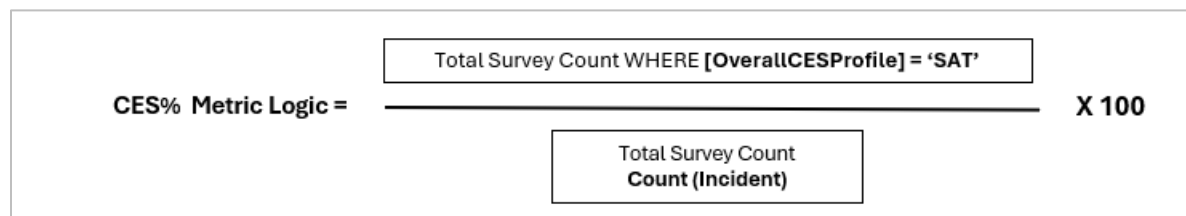
Net Promoter Score (NPS)

Definition: Net Promoter Score (NPS) is a metric that measures how likely customers are to recommend a business. It's a standard way to gauge customer satisfaction and loyalty.

NPS Metric Logic = CSAT% - DSAT%

Customer Effort Score (CES%)

Definition: Customer Effort Score (CES) is a customer experience metric that measures the ease with which customers can use a product or service, resolve a support issue, or find the information they need. For example, in this case it measures percentage of customers who rate 9 & 10 for question such as *“How would you rate your overall ease of using the service?”*. The rating is captured under field ‘Q2-CES’.






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Target

In the **Customer Experience and Feedback Analytics Power BI Template App**, an organizational target of **85%** is used for representation and comparison purposes. The three Customer Experience Metrics—**CSAT, NPS, and CES**—are evaluated and compared against this target to derive actionable insights.

A color-coded dot next to each score visually represents the metric's performance against the target, providing an intuitive understanding of whether the target has been met, exceeded, or missed.

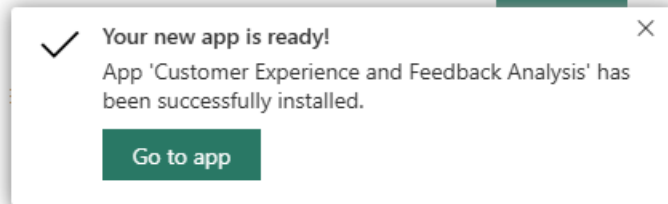
- *Green*  → *Above Target*
- *Yellow*  → *Below target but within 5% threshold*
- *Red*  → *Below Target more than 5% threshold*

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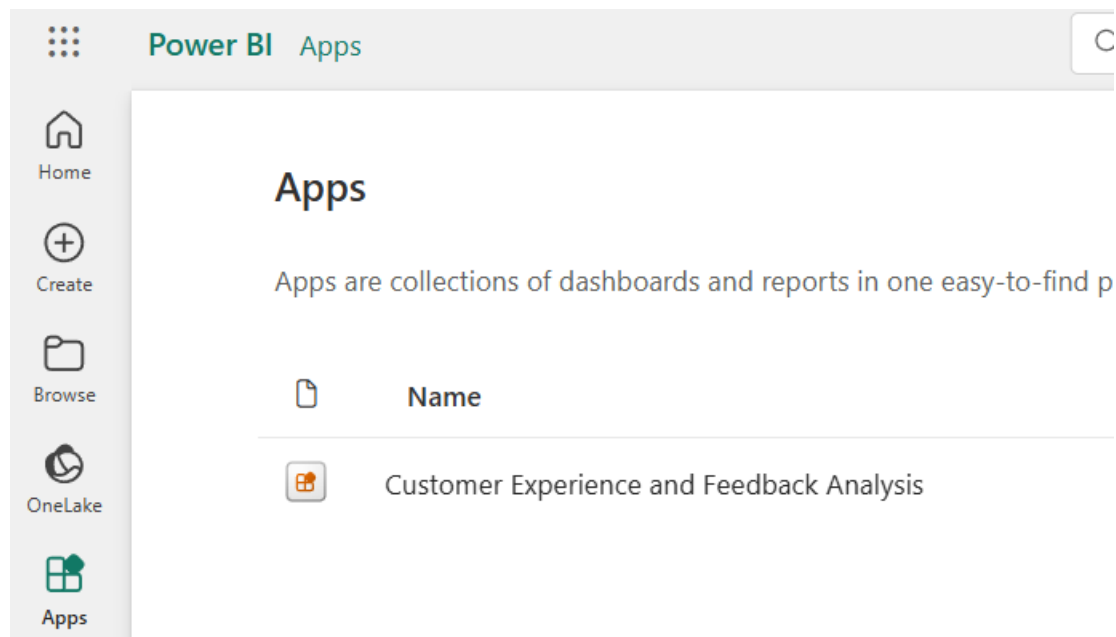
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Connecting to own data:

Once the Power BI Template App is installed successfully, the below message will appear:



In Power BI Service > select **Apps** on your navigation pane > Select **Customer Experience and Feedback Analysis**

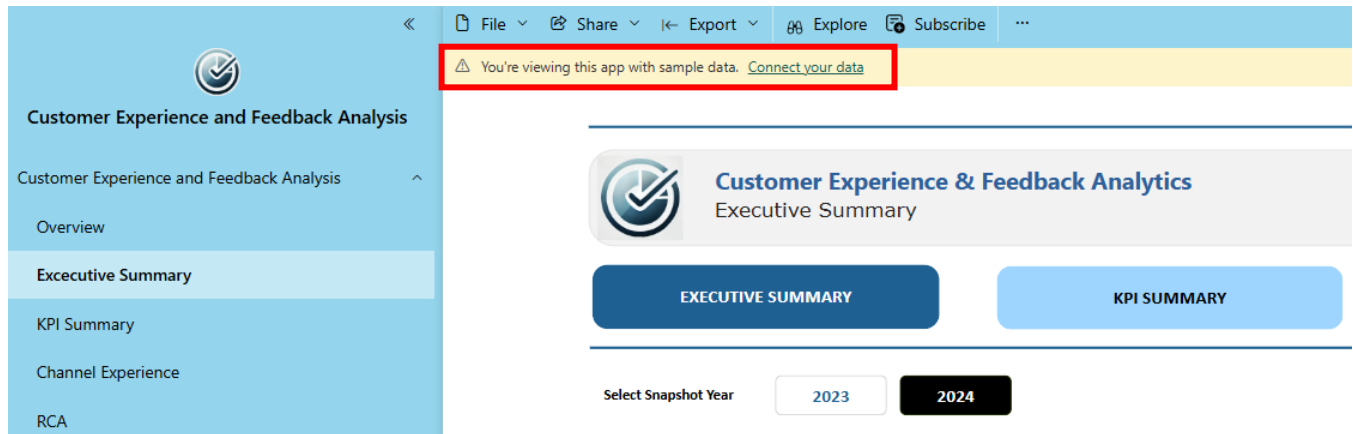


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By default, the **Customer Experience and Feedback Analysis** App connects to sample data.

Click on “**Connect your data**”



Please Note:

For seamless connectivity, the raw data collected from customers surveys and questionnaires need to be prepared and stored in Power BI compatible data sources. Data might require additional transformation before connecting to the App. Please contact us at <https://www.quartilebi.com/contact-us> for more information.


In the below window that appears:

- Enter **Data Server Name** (Some examples of supported RDBMS are SQL Server, Azure SQL Server, PostgreSQL etc)
- Enter **Data Base Name** (Database containing the final customer survey data that needs to be analyzed)

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Enter **Username & Password** to connect to the Database Server and Data Base entered in previous screen
(Please contact your Database administrator if you do not have this information)

 **Connect to Customer Experience and Feedback Analysis**


You are connecting to

Server

quartilebi.database.windows.net

Database

customerfeedback



User name

Password

Privacy level setting for this data source [Learn more](#)

Private

[Go to the app documentation](#)

Back

Sign in and connect

Cancel

Following message will appears during connection.

File Share Export Explore Subscribe ...

You're viewing this app with sample data. Refresh is in progress.

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For more information

Website:

<https://www.quartilebi.com/>

Support:

<https://www.quartilebi.com/contact-us>

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