



CHEAT SHEET

# 9 Ways to Analyze

Customer data comes at you from all directions, from many sources, and in dozens of formats. Omni-source data collection makes it possible to aggregate all this data, and customer analytics lets you find trends that illuminate the overall customer experience.

But it's not enough to only look at the big picture. It is also crucial to be able to dig deeper into data to look for specific insights. Here are nine examples of analysis techniques to find insights in your data.

## 1. Detect new themes using machine learning

One of the benefits of analyzing unstructured text is the chance to discover completely new or surprising topics in your feedback. Machine learning techniques can identify these new patterns in your data automatically. This allows you to keep up with new areas of interest as they occur in real time. This is especially useful when analyzing social media data, where new themes of feedback occur daily.

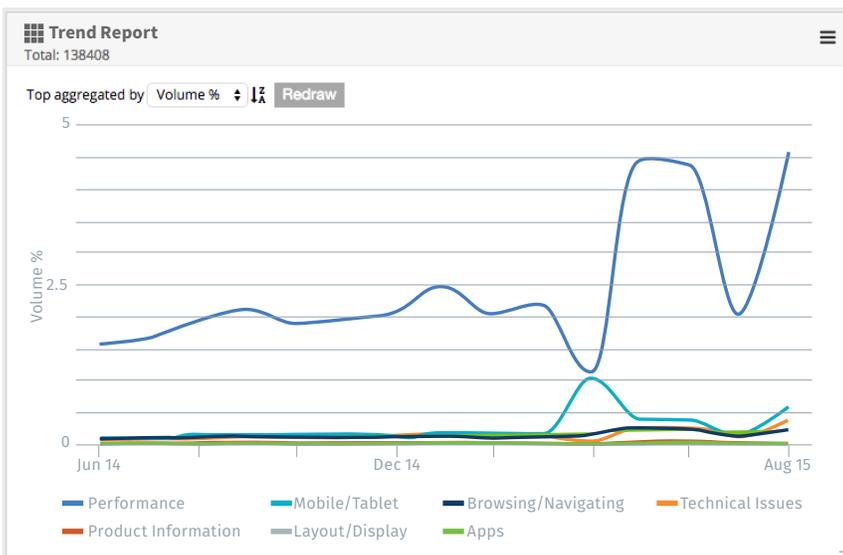
**Example:** A car maker saw new complaints about bumpers—which were fine at the factory. They traced them back to how bumpers were stacked for shipping.

## 2. Monitor trends and spikes in themes

It's not only important to view overall volumes of feedback, but see how they shift over time. Trending data allows your analysts to see movement in theme volumes by days, weeks, years, or even in a small 24-hour period. When you witness spikes in data, you have the opportunity to rapidly react to customer trends or to monitor on-going issues to gauge their importance.

**Example:** A global chain gauged reactions to a risky campaign, and pulled the plug when the negative voices were clearly outweighing positive ones.

Monitoring over time shows how comments about web usability have spiked.



## 3. Perform multivariate regression to find root cause

It can be difficult to find the root cause when customer volume, sentiment, or satisfaction scores start moving. This difficulty is multiplied as more data sources are thrown into the mix, and when several layers of structured attributes may be contributing to the change. Using multivariate regression, multiple attributes, themes, and Natural Language Processing (NLP) attributes (word proximity and relationships) can be analyzed at once. Then the significance of these factors can be measured, unlocking the most important issues.

**Example:** Multivariate regression showed the root cause of low sentiment for a cafe chain: birds bothering customers sitting outdoors.

## 4. Segment to identify key differences

Segmenting data makes it easy to find drivers of customer satisfaction among different groups. What themes do high-level revenue customers like more, compared to lower revenue customers? Which of these themes do high-value customers mention most often? Analyzing different segments of your data using the same models lets you locate points of differentiation.

**Example:** By segmenting their feedback data, a consumer advocacy group was able to isolate the different needs of members of different ethnicities.

## 5. Use KPI metrics in conjunction with unstructured themes

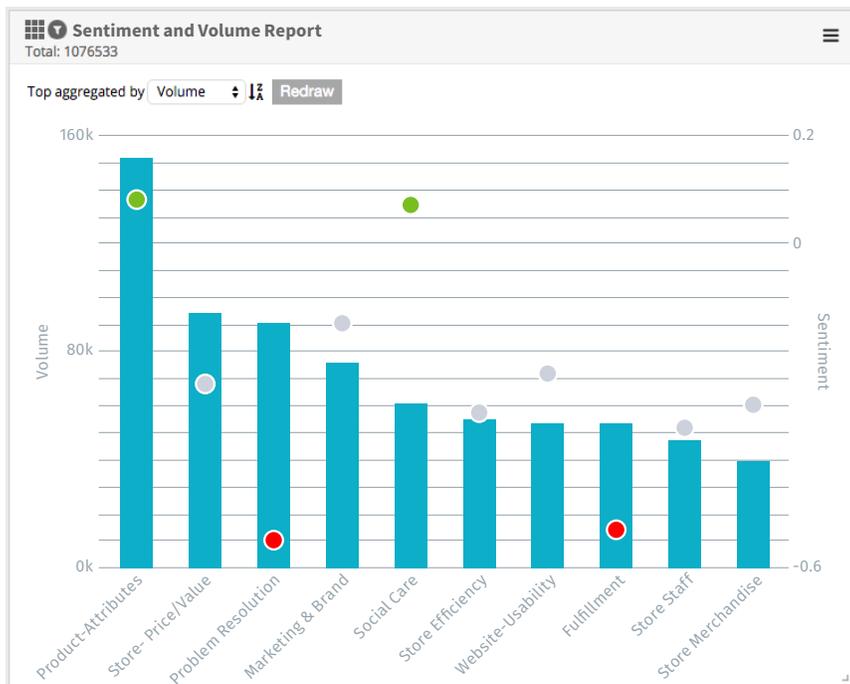
You're probably already using KPI metrics such as review rating, Customer Satisfaction scores (CSAT), or Net Promoter Score (NPS). However, additional insights can be found by mapping these metrics against unstructured feedback to reveal the "why" driving your scores.

**Example:** A leading managed cloud provider gets more value from two survey questions (NPS and "why?") than they used to from fifteen.

Clarabridge helps hundreds of the world's leading brands understand and improve their customer experience. Using advanced text analytics, Clarabridge transforms survey, social, voice and all other forms of customer feedback into intelligence used to empower confident, decisive action across the business. The result: happier customers. For more information, visit [www.clarabridge.com](http://www.clarabridge.com).



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## 6. Apply sentiment analysis to find areas of customer unhappiness

Sentiment analysis is an incredibly useful tool in analyzing all sources of unstructured data. Sentiment analysis examines your data for positive or negative context, giving you a second dimension of analysis beyond volume or Key Performance Indicator (KPI) metrics. Using sentiment analysis, you can see how different themes affect customer experience, either positively or negatively. Additionally, sentiment can act as a singular metric of performance across all sets of data.

**Example:** Despite mostly high marks a service provider had low scores in one area. They drilled down, found issues, and made fixes to raise sentiment.

Sentiment analysis shows that problem resolution and order fulfillment are areas of customer dissatisfaction.

## 7. Pair sentiment analysis with CSAT metrics

Looking at KPI metrics in conjunction with themes shows you the high- and low-performing touchpoints along the customer journey; however it does not always show you the best ways to improve those metrics. For example, you may find that long call wait times produce low sentiment—but they are also associated with average CSAT scores. This tells you that although people are unhappy with call waiting, it does not significantly impact their overall customer experience.

On the other hand, you might find that low sentiment regarding website Navigation is also associated with low CSAT. Improving your website, then, is likely to generate improvements to your overall CSAT score.

**Example:** Customers of a large financial org complained about service descriptions and gave low CSAT scores. They fixed the text & scores went up.

## 8. Create predictive models

It is not enough to be merely reactionary towards your data; to successfully improve the customer experience, you must become prescriptive. When you use regression techniques, your predictive models can engineer suggestions to help guide your business decisions. These models can help predict improvements in KPI metrics or in monetary metrics like revenue. Predictive analysis gives you the confidence to move forward with your customer experience investments.

**Example:** A global beverage maker tracked social mentions of different sweeteners to predict reactions to new products and understand brand impact.

## 9. Combine all techniques to create a data-driven culture

Data analysis can be incredibly powerful, but you will never realize its value if you don't take action on the insights you uncover. Use dashboards, alerts, and case management functionality to push data and insights throughout the organization. These tools allow the information to be delivered to the right person at the right time to take action, opening communication across departments and at all levels of leadership. The volume of customer feedback is never going to slow down—your organization must learn to absorb, react, and learn from data faster and more efficiently than ever.

**Example:** Corporation unites 50 sources of customer data to identify issues and improvements, and impacts \$110 million in customer transactions.

