

VOC Visual Dashboard creation

Sandsiv, October 2020

mashroom6

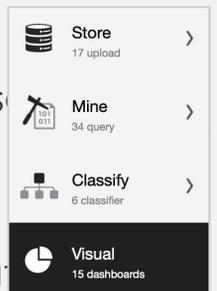
Today's session - Agenda

What will we do today?

1. Build your first dashboard with gadgets for data analysis
2. Create distribution charts to visualise Sentiment, Topics, Touchpoints
3. Create charts using time periods
4. Apply filtering and advanced settings
5. Create drilldowns
6. Create wordclouds
7. Use Global filters
8. PLAY and EXPERIMENT!

PLEASE NOTE

1. The number of objects (uploads, queries, dashboards) shown for each module will vary, depending on your VochUB s
Our screenshots in this tutorial are based on our own Demo platform, which already has some objects (see right).
Do not worry if you see different numbers.
2. The results you get in the Visual Gadgets, especially classification results (Sentiment or Topic), may be different to what
the tutorial screenshots. This is normal and is due to the small variability in the classification algorithm.



UPLOAD

&

VISUALIZE YOUR DATA

Upload your data

Upload and classify a new file, to be explored in Voc Visual

VocVisual Dataset (541).csv

TEXT	NPS	Survey date	Touch Point	CES	Address
did you see my data bill? Insane!! I feel scammed.	1	03.03.18	Billing	3	411238815
its too expensive to phone mobiles	7	03.03.18	Billing	4	411246783
greater clarity in the offers	7	04.03.18	Billing	4	411246815
In the store they give me one answer, over the phone another. What should I do?	0	05.03.18	Retail	3	411237567
I as an old client I pay twice as much as my friend who got a new client offer	0	06.03.18	General	4	411237599
The quality of the sound is so bad that I can't understand half of the words	2	07.03.18	General	5	411241695
The dialing is very hard because sometimes the machine won't select the number	1	08.03.18	Onboarding	4	411238847
I bought a new fix line two weeks ago and it's already broken.	1	09.03.18	General	2	411238879
I can't use this internet because I lose connection to it every twenty minutes	1	10.03.18	Onboarding	2	411238911
The overall service is quite bad	7	11.03.18	General	5	411246847
My iPhone won't charge itself. And this continues even after I bought a new one	2	12.03.18	General	4	411241727
When I use my iPhone it becomes so hot I must wait for thirty minutes for it to cool down	1	13.03.18	General	4	411238943
When I looked at my phone yesterday it had wiped out all of its memory because I forgot to back it up	0	14.03.18	General	4	411237631
I bought a new Nokia three weeks ago and it's already not working.	1	15.03.18	General	2	411238975
Courtesy, friendliness, availability, commitment and preparation.	9	16.03.18	Retail	1	411251551
friendly staff in the shop and fast	9	17.03.18	Retail	1	411251583
I went last week to your shop in Bahnhofstrasse and wanted to buy a new phone but the staff was	0	18.03.18	Onboarding	5	411237663
incompetent! Your staff in the shop have not been able to tell me even when I asked them	0	19.03.18	Onboarding	3	411237695
In the shop they told me to call the toll-free number. My problem was solved	7	20.03.18	Retail	2	411246879
Unfriendly staff, that I was not able to give any answer, is also presented in other shops	0	21.03.18	Retail	5	411237727
Incompetence, poor listening skills, quickly and inconclusiveness!	0	22.03.18	Retail	5	411237759
Does not keep what it promises ...!	2	22.03.18	Retail	5	411241759
I visited your store during my lunch break. But my lunch break was gone because of the queue	0	23.03.18	Retail	4	411237791
My phone works very well.	9	23.03.18	General	1	411251615
The sound and quality are both very bad.	2	24.03.18	General	5	411241791

1. Upload dataset to Voc Store. Use “;” as a delimiter and set the correct data types for each column. If you don't specify a data type (e.g. for Touch Point, it will default to just a metadata type)

Title Voc Visual Dataset

Captured at 3 Jul 2020

Language Only English

Choice delimiter |

CSV delimiter ;

Submit

Verification section

- TEXT**: TEXT, LANG, DATE, NPS, NUMERIC, CHOICE
- NPS**: TEXT, LANG, DATE, NPS, NUMERIC, CHOICE
- Survey date**: TEXT, LANG, DATE, NPS, NUMERIC, CHOICE
- Touch Point**: TEXT, LANG, DATE, NPS, NUMERIC, CHOICE
- CES**: TEXT, LANG, DATE, NPS, NUMERIC, CHOICE
- Address**: TEXT, LANG, DATE, NPS, NUMERIC, CHOICE

2. Check that the upload was successful

Title	Original name	Uploaded at	Last Update	Progress	Feedback records	Actions
Voc Visua...	VocVisual Datas...	08:43, 3 Jul 2020	08:43, 3 Jul 2020	Processed: 541 100%	541	

3. Apply both of the Sentiment and Topic classifiers from the previous lesson to the uploaded datasource.

Don't forget to Reprocess the classifiers!

Classifier Sentiment_SandSIV_Training appliance details

Choose upload

- SandSIV Training Feedback data x Voc Visual Dataset x

SandSIV Training Feedback data -
2020-06-29T11:21:14+0200

- TEXT
- Multitopic

Voc Visual Dataset -
2020-07-03T08:43:47+0200

- TEXT
- Multitopic

Classifier TopicClassifier_SandSIV_Training appliance details

Choose upload

- Voc Visual Dataset x SandSIV Training Feedback data x

Voc Visual Dataset -
2020-07-03T08:43:47+0200

- TEXT
- Multitopic

SandSIV Training Feedback data -
2020-06-29T11:21:14+0200

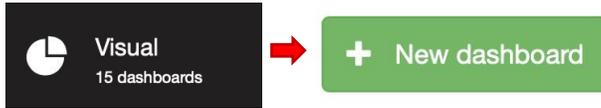
- TEXT
- Multitopic

Practice makes perfect!

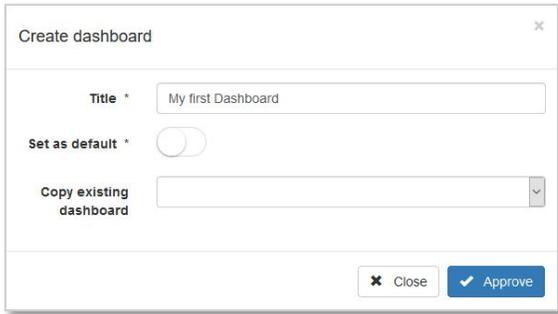
Visualize your data

Create your first dashboard and visualise the NPS Score

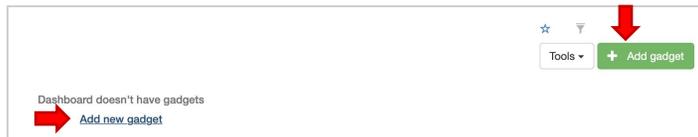
1. Go to VOC Visual and select “+ New dashboard”



2. Give an appropriate name, e.g. “My first Dashboard” for today, and “Approve”



3. You now need to add a visualisation, we call this a **Gadget**. Click either the link of the button “Add Gadget”.



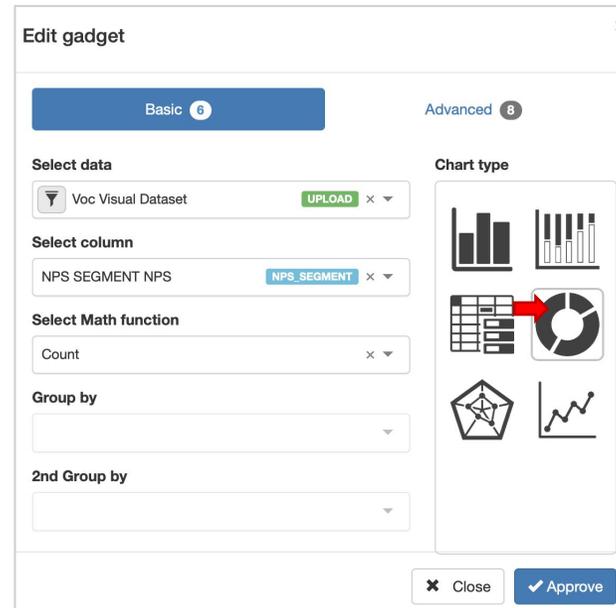
4. Let's now configure the Gadget and tell it what to show us!



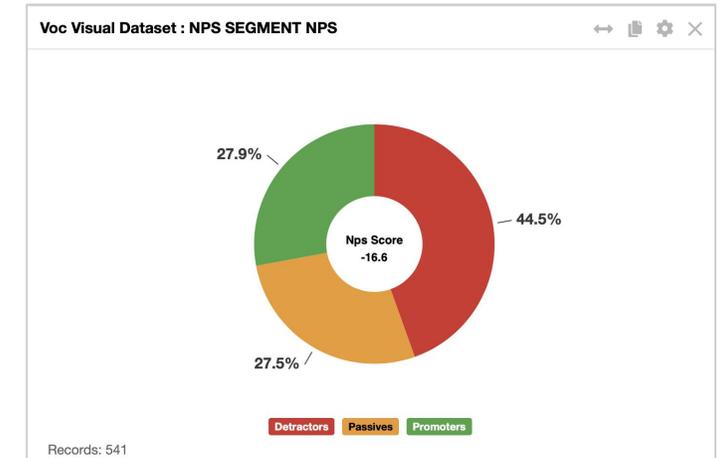
5. Select the “Voc Visual Dataset” in “Select Data”. It is a type “Upload”. You can also select Surveys and Virtual sources.



6. Select “NPS SEGMENT NPS” as column
7. Choice the Math function “Count”
8. Select your Chart type “Pie chart”
9. Acknowledge with “Approve”



10. Enjoy the result of your NPS Score distribution



TRY OUT

1. What do the buttons on the top-right corner of the gadget do? Try them out!



2. How can you rename your gadget? Try it out!

Visualize your data

NPS Segment by Touchpoint

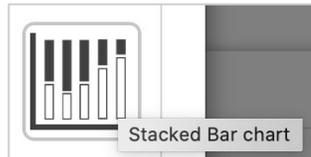
1. Duplicate your gadget, so you already have the basic setup



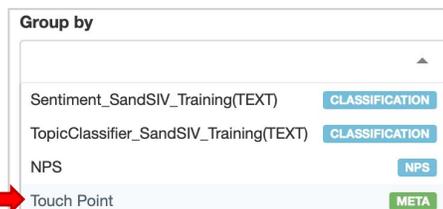
2. Edit the Gadget

3. You should already have the "NPS SEGMENT NPS" as column, "Count" as the Math function and "Pie Chart" as the Chart Type

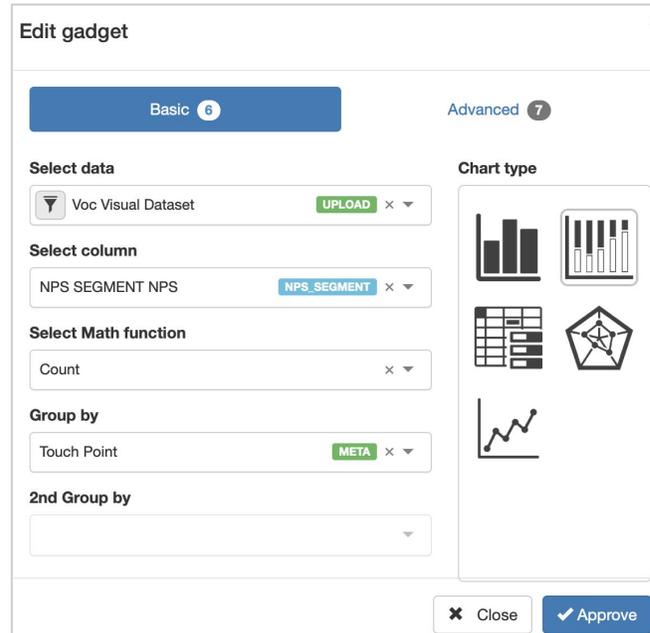
4. Select the "Stacked Bar" Chart type option



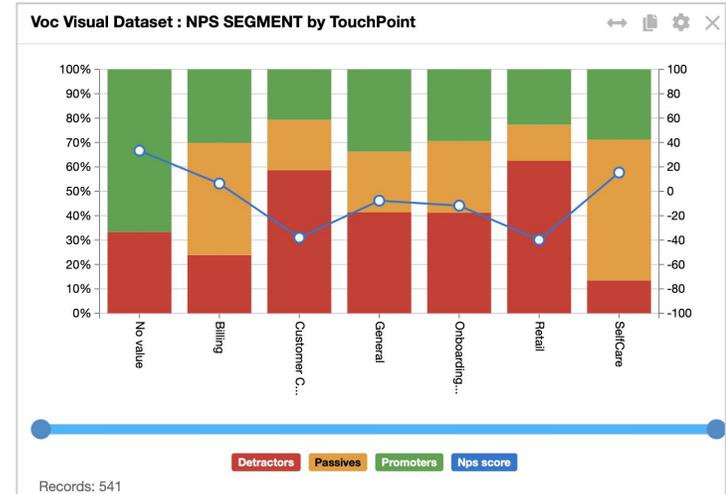
5. This will now allow you to select another column in the Group by dropdown. Select "Touch Point"



5. Your Gadget configuration should look like this:



6. Explore the Touchpoints by their NPS Segment distribution



ANALYSE

1. Which Two Touchpoints need the most attention?

.....

2. What is the No Value Touchpoint? Where did it come from?

.....

3. What is the NPS Score for Self Care Touchpoint and how many feedback cases are included for this touchpoint?

.....

Visualize your data

NPS by Touchpoint Over Time

1. Duplicate your previous gadget, so you already have the basic setup. It's a good practice to rename it, e.g. "NPS by TouchPoint over Time (Month)"

2. Edit the Gadget.

3. Change the "NPS SEGMENT" selection in the "Select Column" to "NPS"

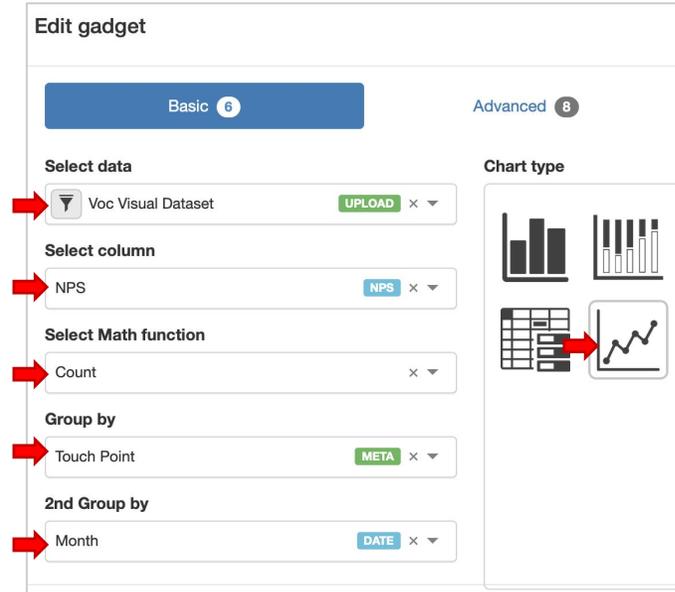
3. Select the "Line Chart" Chart type option



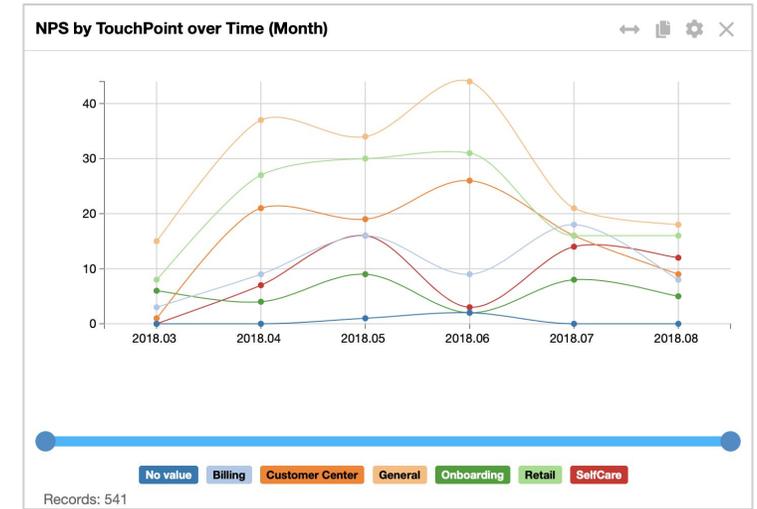
4. This will now allow you to select another column in the 2nd Group by dropdown. Select "Month", which is a DATE type



5. Your Gadget configuration should look like this:



6. Explore the Touchpoints by their NPS and by Month



ANALYSE

- Which is the worst performing month for "Onboarding"?
.....
- In which month do all touchpoints have an avg NPS < 20?
.....
- How can you reduce the timeframe shown on the Gadget?
Hint: check the blue slider.
.....

Visualize your data

Filtering by Touchpoint and showing the score labels

1. Create a new Gadget with the following configuration:

Select data
 Voc Visual Dataset [UPLOAD] x

Select column
 NPS SEGMENT NPS [NPS_SEGMENT] x

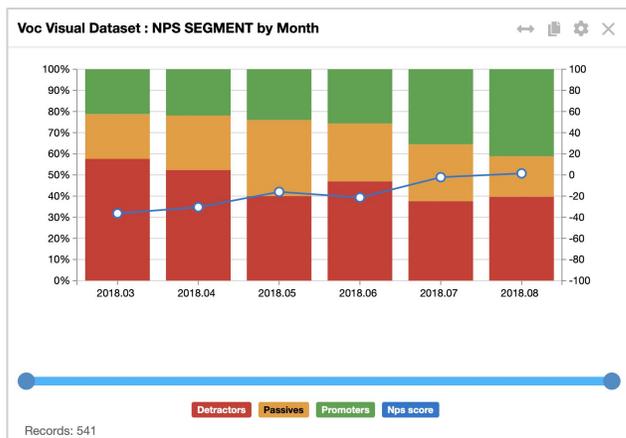
Select Math function
 Count x

Group by
 Month [DATE] x

2nd Group by
 []

Chart type
 [Bar chart icon] [Grouped bar chart icon] [Table icon] [Line chart icon] [Area chart icon]

2. You should see the following results.



3. **Edit the Gadget** and select "Advanced" settings
4. Activate "Show Score" if wished
5. Activate "Metadata filter"
6. Select "Touch Point" in the first drill-down box
7. Choice function "Equal"
8. Select "Retail" from your touchpoint list
9. Acknowledge with "Approve"

Edit gadget

Basic 6 → **Advanced 7**

Custom DATE

Period: Absolute Relative

From: dd-mm-yyyy To: dd-mm-yyyy

Show Score

Metadata filter

Touch Point [Retail] x

Equal [AND]

OR

Custom color set

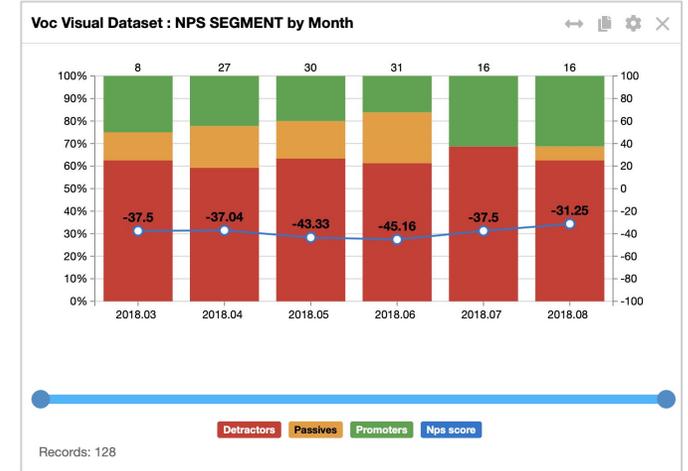
Drill Down

Long labels

Close Approve

10. Notice the changes:

- the score displayed for both metrics
- The data being focused only on the Retail touchpoint



ANALYSE

1. How many feedback cases are in the Retail touchpoint?

2. Which month has no Passive NPS feedback responses?

3. Which month has the most number of responses AND the lowest NPS Score?

Visualize your data

Filtering by Touchpoint (Retail) and Sentiment Classification

We will now build a table gadget allowing the browsing of all base data and text cases.

1. Create a new Gadget with the following configuration:

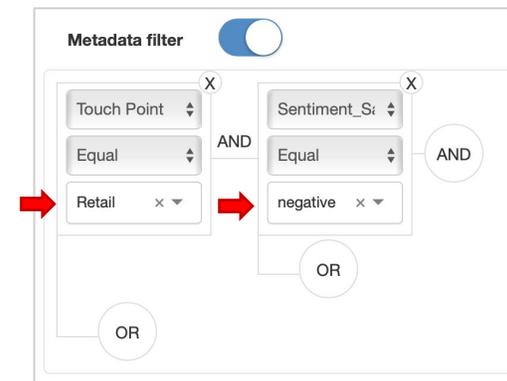
IMPORTANT: make sure you select "Just Show" in the Math function, otherwise you won't be able to add multiple columns in the "Select Column" box

2. You should see the following results (browse the table to see the mix of sentiment classification results).

Survey date	Address	TEXT	Sentiment_SandSIV_T...
2018-08-08	411240063	your services are uncl...	negative
2018-08-09	411240095	It takes more than thirt...	negative
2018-08-17	411240127	When I watch TV the c...	negative
2018-08-21	411240159	The queue in the store i...	negative
2018-04-02	411240191	I couldn't believe it, I g...	positive
2018-04-09	411240223	decrease the wait befor...	positive
2018-04-09	411240255	To Standardize professi...	positive
2018-04-23	411240287	increase the credit lines...	positive
2018-04-24	411240319	I get to call a hundred c...	positive
2018-04-24	411240351	Thousand minutes of fr...	positive
2018-04-27	411240383	Easy, nothing more to s...	positive

3. Edit the Gadget and go to the Advanced Settings.

4. Create a Metadata filter, combining two column conditions using AND



5. Browse the results – do you see any “positive” comments?

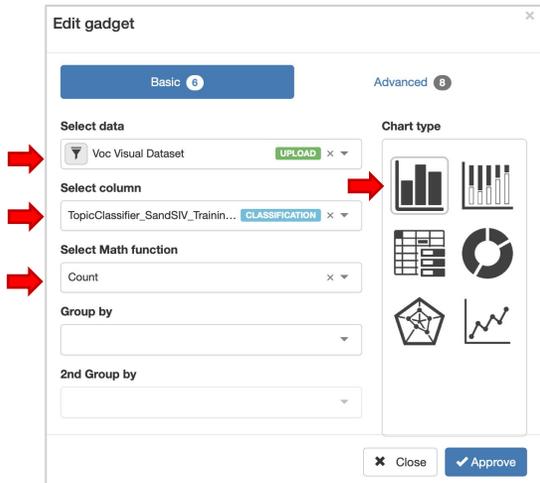
Survey date	Address	TEXT	Sentiment_SandSIV_T...
2018-03-05	411237567	In the store they give m...	negative
2018-03-20	411246879	In the shop they told m...	negative
2018-03-21	411237727	Unfriendly staff, that I ...	negative
2018-03-22	411237759	Incompetence, poor list...	negative
2018-03-22	411241759	Does not keep what it ...	negative
2018-03-23	411237791	I visited your store duri...	negative
2018-04-01	411239007	Horrible queue in the st...	negative
2018-04-04	411246975	Very competent service...	negative
2018-04-08	411239039	The same thing than fo...	negative
2018-04-12	411239103	The service in general i...	negative

Visualize your data

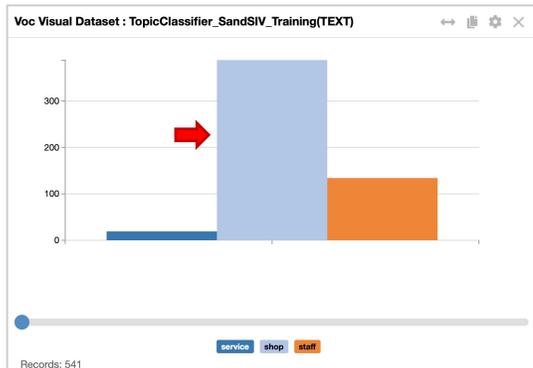
Topic Distribution and Drilldown

We will now build a bar graph gadget showing the distribution of the topic classification and allowing drilldown into details

1. Create a new Gadget with the following configuration:

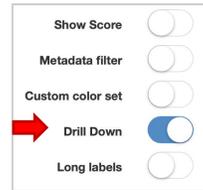


2. You should see something like the below results.



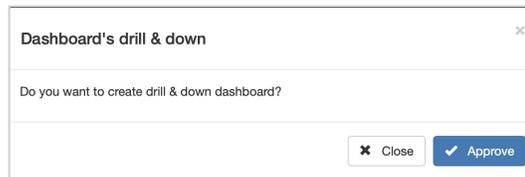
3. Change the colour scheme to something you like. HINT: Advanced Settings

4. Go to Advanced Settings (again!) and switch on the Drilldown button



5. Click **Approve**. Did anything change? Not yet!

6. Click on the “shop” bar. Click **Approve** on the popup message



7. You will get a new blank dashboard. But it's not totally blank! This is a drilldown dashboard for the parent gadget.

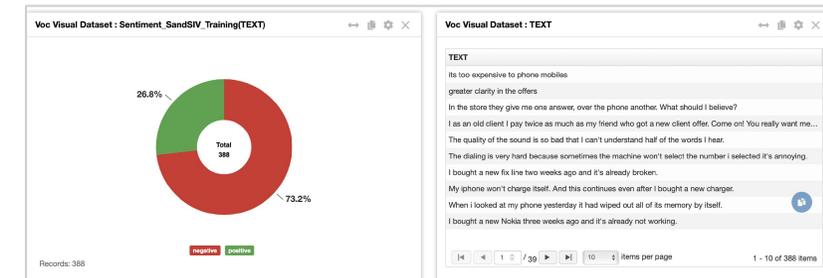


8. Add a gadget. You will get a default chart gadget showing the “shop” bar.

9. Edit the Gadget. Notice that the "select data" dropdown is locked. Why?



10. Build two gadgets like below. One to show Sentiment distribution and the other to show the individual text cases (remember – for “shop”)



11. Return to the parent dashboard by clicking the up arrow



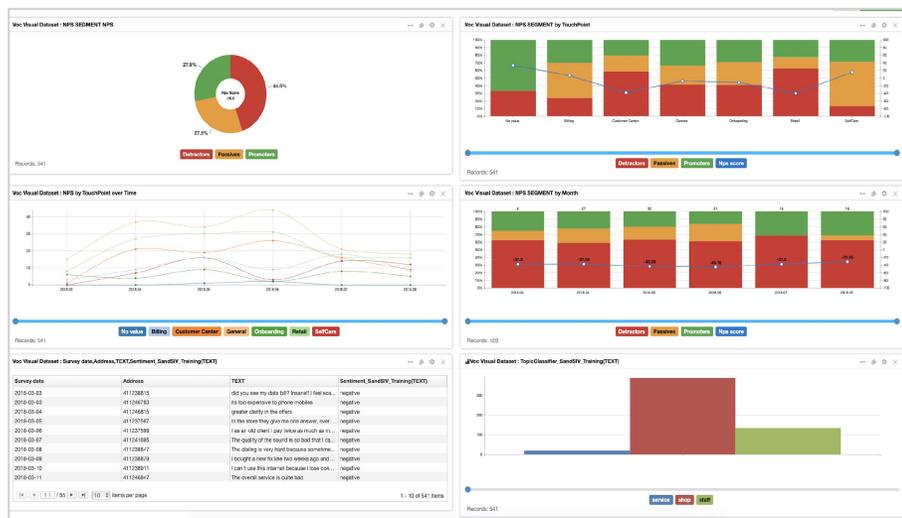
12. Do you now see a new icon next to the chart heading? That's the drilldown indicator. Try clicking the other bars (staff and service) to see what happens.



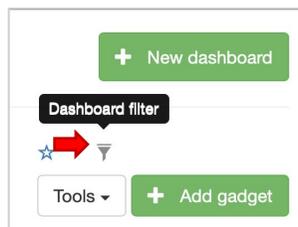
Visualization options

Global Filters

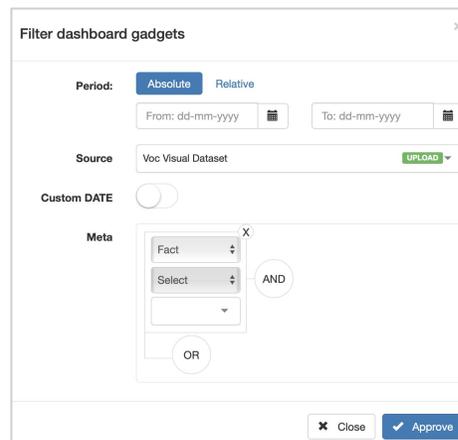
1. Make sure you are in your main (parent) dashboard
2. It should look something like this:



3. We will now apply a global filter for the whole dashboard for a particular date range
4. Click the Funnel button on the top-right corner



5. The interface of the popup should be somewhat familiar. You can add metadata or date filters



6. The interface of the popup should be somewhat familiar. You can add metadata or date filters

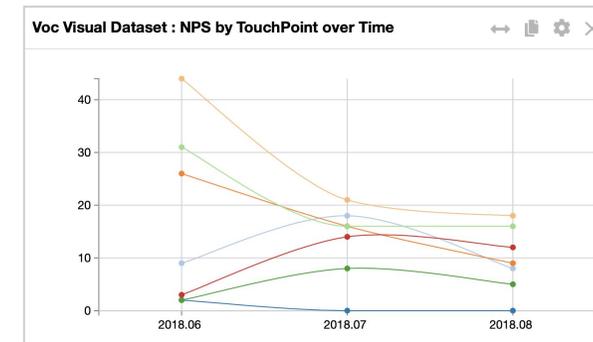
7. Enter the Period from **01-06-2018** to **31-08-2018** in the **Absolute Date** filter. Click **Approve**



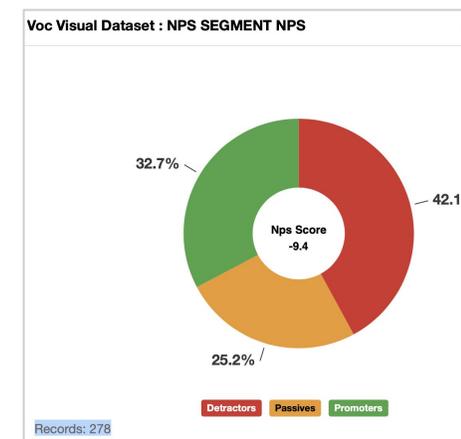
8. What happened?

9. You should see two main changes:

- 9.1. charts with a DATE x-axis will show only data for those month periods

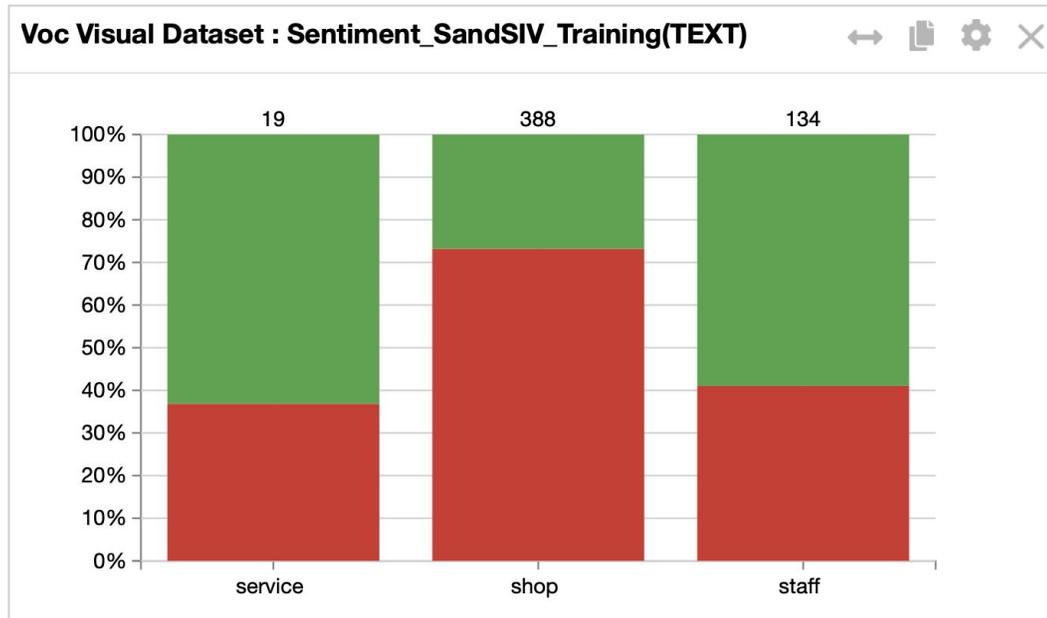


- 9.2. The count indicator for all charts (even if not displaying a time period) will be updated to reflect the new time period.



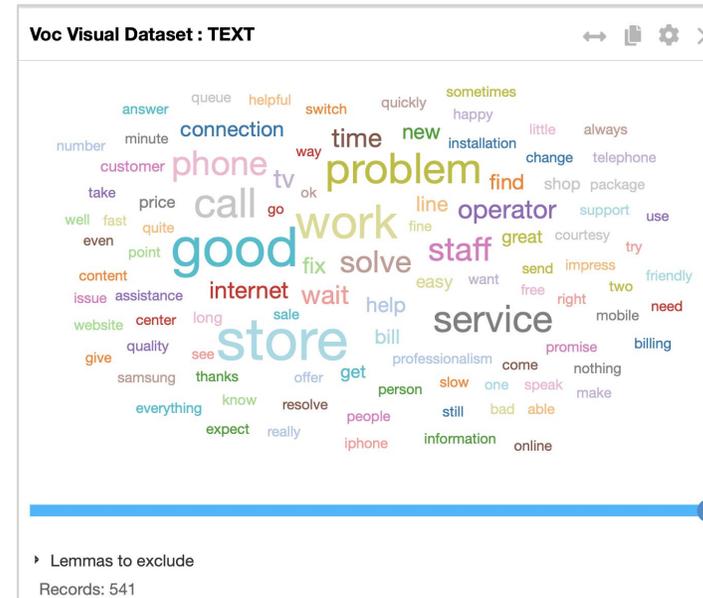
VOC Visual Exercises

1. Create a new gadget to show the distribution of Sentiment vs Topic classification results.



Which topic is causing the most negative experience for customers?

2. Visualise all comments as a text cloud.



3. Can you now create two separate Word cloud gadgets, one for Negative and one for Positive feedback cases?

4. Can you create a drill down for a particular word and view the individual texts!? Try it!



BECAUSE BEING HUMAN IS A GOOD BUSINESS

sandsiv+
customer intelligence made in switzerland