BUYER'S GUIDE:

Choosing the right feedback analytics solution

Version 3.0

Feedback is a barometer for spend, adoption and loyalty. Unfortunately, it is rarely analyzed effectively.

Users report what they do and don't like about products and experiences through many channels: contact centers, support tickets, review sites, surveys, & social media. This feedback data is a goldmine, containing valuable insights about what drives your key business metrics. The challenge is in cutting out the noise to extract the information that matters most, and making it accessible to everyone.

Feedback analysis is a deceivingly hard problem to solve, and very few solutions are truly great. They report numbers on dashboards and word clouds from survey responses, but provide only limited tools to understand what drives these results. As a result, decisions are made based on partial, often incorrect, information, anecdotes and gut instincts. Critical customer needs are undiagnosed and ignored, and product teams lose their chance to make a difference.

Text feedback often contains the richest insights, which is why it's vital to find the right solution. If you get started on this late, you'll miss the rich, contextual insights that show you how to grow, how to reduce churn, and why issues matter.

In this guide, we'll help you differentiate feedback analytics solutions who over-promise from those who actually deliver, so you can make sure to get the insights and understanding you need.

We'll also cover Generative AI-based features and DIY solutions. Large Language Models like those powering ChatGPT can be applied to feedback analysis easily and there are opportunities to gain there, but also there are limitations.

Finally, it goes without saying that any solution will need to provide you with the right level of data privacy and security.

Make sure you pick a SOC2 Type II compliant solution.

How to ensure your Feedback Analytics solution delivers the insights you need

How can you stop poor decision making in its tracks?

How can you help your team have the right data at the right time, in the right format?

Since you don't evaluate your feedback analytics solution every day, it can be hard to separate marketing fluff from truth. Whether you're looking at a DIY tool, a customer feedback management solution, or an automated feedback analytics platform, this guide will help you choose the right option for your business.

We've divided our evaluation into three sections, and provided a handy checklist for each:

1. Feedback collection capability
2. Text analytics capability
3. Reporting capability and functionality

Feedback collection capability

For the best possible insights, you need to be able to analyze feedback data from multiple channels, so what you're after here is comprehensive feedback collection.

Take me to the checklist!

Feedback sources

Find out what sources of feedback are supported by your potential solution. If they're worth their salt, encourage you to use all sources, both internal (surveys, contact center, support tickets, complaints, CRM notes) and external (review sites, forums, social media). Limited sources means limited feedback, and is biased to those customers who use them - you lose the full picture of your user's experience. That said, since the rise of Generative AI, many public sites made scraping difficult. So, test first to avoid overpromises.

Feedback differentiation

Can your solution tell the difference between feedback and noise? Not all data is equal. Depending on the source, feedback may be mixed up with non-feedback. For example, support conversations containing not just details of user problems, but additional discussion, standard & scripted responses, and greetings. Some solutions will expect you to provide data already cleaned of this additional chat, which can be a large task.

Look for a solution that filters out non-feedback like greetings, irrelevant chatter, and mentions that aren't feedback.

API

Often feedback is collected using an in-house solution, needs to be redacted in-house, or needs to be ingested from a central data warehouse. If your solution has an API, you can set up workflows to push feedback into the platform in batches, or individually.

User ID

It's vital to be able to link feedback to user data such as spend, persona, what they bought, and how long they've been customers. Ask whether you can reconcile user records with their feedback via user or customer IDs. Setting up custom workflows that combine different data sources into a single view requires this. Or can you export the data to handle it yourself.

Adding new feedback to existing datasets

Check whether your solution offers workflows to automate adding and deduplicating data based on custom rules set up for each user. If the answer is yes, you'll be able to add new feedback to existing datasets without the risk of errors caused by duplicated data.

Text analytics capability

Nearly every analytics solution promises to make your life easier - but some provide meaningful results, while others don't tell you anything new. Here's what to look out for.

Take me to the checklist!

Theme relevance

Applying a bog-standard code frame or taxonomy to your data will be of little use. Look for a solution where the analysis is tailored to each of your datasets, so that your feedback data is tagged with themes that are specific to your products and services, rather than industry-wide.

Lists of themes quickly become unmanageable, so you'll need a taxonomy to help organize and easily navigate your data. This means having base themes (e.g. story), and nested sub-themes (e.g. voice-acting, storyline, characters, game). Use different examples: "stock" for base theme and "out of stock", "in stock", "limited range", "home brand not in stock"

If you want to discover unknown unknowns in your data, then it's essential that emerging themes are added alongside any new data uploads. If your solution shoehorns your feedback data into preset themes then these discoveries will be lost.

AI + Human working together

Find out whether you can edit the taxonomy or the themes within your analytics solution. Nobody knows your company or your product as well as you do, and what matters most changes over time. The analysis should be flexible and adaptable. This becomes especially tricky with DIY solutions based on LLMs.

Somehow you need to teach the model how to interpret your feedback, and it's only possible with a themes editing interface.

Multiple themes across singular feedback

Every piece of feedback, and even sentences, can have multiple themes - users often mention several issues at once within the same piece of feedback. Check whether your solution is able to apply multiple themes to a single piece of feedback. If they're only able to assign one theme, you won't get the full picture and analysis won't be valid.

Pinpointing what's most helpful

How does your solution help you zero in on feedback that you can act on? Different stakeholders have different needs. Some need a birds-eye view, others need to dive deep into the feedback for context and understanding.

Check the granularity of the theme structure in your solutions, looking to see if they go from general to specific. You want to be able to choose to get an overview or zero in on the details. You can add your feedback into ChatGPT, but it'll struggle to manage more than 20 themes, let alone different levels of granularity.

Sentiment analysis

Look at how your potential solution handles sentiment analysis. Do they have custom models trained on feedback similar to yours?

Sentiment within the same sentence can differ, so detecting sentiment on the clause level is better than applying sentiment to the sentence as a whole. For example, "I think your latest update made things easier for users, but it broke the chat feature."

Typos

Feedback data can be filled with misspellings, idioms, typos, & custom terminology. Rule-based approaches or dictionaries will miss language variations. Language models are more flexible and help you get the full picture.

Linking analysis to user data

To zero in on the needs of different customer segments, you need to be able to tie your analysis back to your user data. Check that your solution is able to link all themes back to relevant user records.

Speed of setup and results

If setup takes too long, analysis and results are delayed, and by the time you've extracted your valuable insights it's too late to act on them! Ideally, setup should be possible in days, not months, without affecting the accuracy of your results. Unfortunately, many solutions in the market still rely on manually adding rules for feedback analysis. Those experienced the power of ChatGPT on analyzing text will know that this is an outdated approach.

Reporting functionality and capability

You've successfully analyzed your feedback, and you want to share the results with product teams and stakeholders. You need reporting that tells a succinct, clear story and answers key questions about your product and user experiences.

Take me to the checklist!

Slice & dice

Check how easy it is to slice and dice the data. Look at the selection of filter values, and work out whether you can combine multiple filters.

You want to be able to answer complex questions like "What do users who have been using the product for less than three months say about the integration we recently implemented?"

Filtering by time period

Check whether your solution has flexible date selection, so that you can answer questions like "What did users say during a promotion we ran last weekend?"

Segment comparison

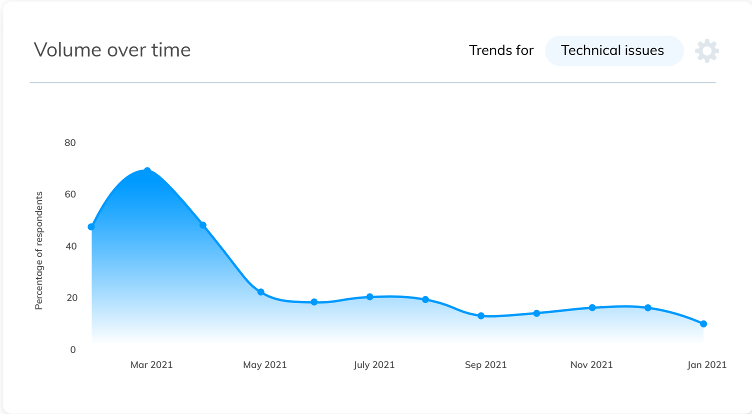
Comparing segments may be vital to your analysis, such as needing to understand why one user segment performs worse than another.

Check whether it's possible to compare two user segments, and find out if your solution has a visual way of seeing both volume and feedback for two segments side-by-side.

Theme changes over time

To understand whether a particular action made a difference to users, which is necessary for ROI reporting, check whether it's possible to see how a theme changes over time.

Ideally, your solution will allow you to easily track changes in theme volume, as well as changes in score or impact for that theme on an overall metric.



Themes impacting score

Metrics are often the fallback for decision-making, but it's miles better if you're able to understand what's driving your score up or down and by how much. For example, you can easily discover whether users care more about faster, or cheaper, delivery. User feedback won't always contain the answer you're looking for, but at the very least you'll know which direction to take.

Look for a solution that has an analysis view comparing the impact of different themes on the overall metric.

Metric changes over time

It's important to be able to quickly understand and explain changes in metrics over time. Look for a solution that has an analytics view showing why the metric of your choice has increased or dropped.

Linking feedback to financial metrics

Feedback data should be able to explain changes in financial metrics such as spend and churn. Find out whether you can filter by financial metrics or use these in the same way as you would satisfaction scores, to easily link feedback to your financial metrics.

Exporting analysis

To make it possible to combine your analysis with internal company data, check whether you can download and export analyzed data, or pull it from the API.

Dashboard functionality

Dashboards that are easy to use and configure make it a breeze for everyone in the company to understand the key themes in your feedback.

Check whether your solution lets you create dashboards that report on metrics as well as what's driving them. Look for both impact widgets and overall theme widgets.

Customizable widgets

While you're checking out dashboard functionality, make sure to test the level of customization. Different teams need to track different information, so having a wide selection of widgets available with which to customize your dashboard is extremely helpful.

Think about what your teams may need to track, such as score, comparison, themes on the rise, and impact, and match these to what your potential solution offers.

Powerpoint reports

If Powerpoint is a common way of reporting in your company, you need to be able to easily report in this format. Check whether you can create a Powerpoint report by exporting data in PPTX format and editing it.

Updates and alerts

What's the easiest way for your team to receive regular updates of your analysis? Take this into account when choosing a feedback analytics solution - check whether you can sign different people to receive relevant reporting info via email, or slack.

It could also be super helpful for different teams or team members to receive alerts on changes in themes, emerging themes, or specific words popping up in your feedback - such as a user mentioning a new feature.

Ask if these sorts of notifications are possible.

Overall picture

Using many different dashboards can make it difficult to focus the company on what matters. Check what options are available to aggregate feedback into a single picture, to explain how your company is doing overall. You're looking at whether they can aggregate not only different scores into a single metric, but also different kinds of datasets: live chat, complaints, online reviews.

User management

Data privacy is hugely important, and it's critical that every person in the company only has access to the data they need to do their job. Check whether it's possible to add different user roles and set their permissions in a granular way.

Reporting functionality and capability checklist

Depending on the size of your business, your needs will differ, but we trust this guide will help you evaluate the various analytics platforms on offer so you can find the best possible solution.

All the best on your quest to turn feedback data into insights!

Feedback collection checklist

Capability	Criteria	
What sources of feedback data are supported?	Look for a solution that can handle many sources: internal - surveys, contact center, support tickets, complaints, CRM notes and external - review sites, forums, social media.	☐
Can you differentiate between feedback vs. non-feedback?	Look for a solution that automatically filters out non-feedback like greetings, irrelevant chatter, and unrelated mentions.	☐
Is there an API?	If your solution has an API, you can set up workflows to push feedback into the platform in batches, or individually.	☐
Can you link feedback to customer records?	If you need to link feedback to user data such as spend, persona, what they bought etc, then check whether you can reconcile user records with related feedback using customer IDs.	☐
Can you easily add new feedback to existing datasets and handle deduplication?	Check whether your solution offers workflows to automate adding and deduplicating data based on custom rules set up for each user.	☐

Text analytics capability checklist

Capability	Criteria	
How do you know which themes are relevant?	Look for a solution where the code frame is tailored to each of your datasets, so that your feedback data is tagged with themes that are specific to your products and services, rather than industry-wide. Does the solution use a taxonomy, and are emerging themes added alongside new data?	☐
Can you teach AI how to theme your data?	Find out whether you can edit the taxonomy and themes. Nobody knows your product as well as you do, and what matters most changes over time. The analysis should be flexible and adaptable.	☐
Can you apply multiple themes to the same piece of feedback?	Every piece of feedback, and even sentences, can have multiple themes. If your solution can only assign one theme per piece of feedback, you won't get the full picture and analysis won't be valid.	☐
How can you pinpoint what's most helpful?	Check the granularity of the theme structure in your solutions, looking to see if they go from general to specific. You want to be able to choose whether to get an overview or zero in on the details.	☐
How do you handle sentiment analysis?	Find out how your solution handles sentiment analysis, and whether they have custom models trained on feedback similar to yours. Sentiment within the same sentence can differ, so detecting sentiment on the clause level is better than applying sentiment to the sentence as a whole.	☐

Text analytics capability checklist continued

Capability	Criteria	
How do you account for typos?	Rule-based approaches or dictionaries will miss language variations. Language models are more flexible and can handle misspellings, idioms, typos, & custom terminology.	☐
Can you link analysis to user data?	Check that your solution is able to link themes back to relevant user records, so that you can zero in on the needs of different customer segments.	☐
How long does setup take?	If setup takes too long, analysis and results are delayed, and less useful as a result. Setup should be possible in days, not months, without affecting the accuracy of your results.	☐

Reporting functionality and capability checklist

Capability	Criteria	
How easy is it to slice & dice the data?	Look at the selection of filter values, and work out whether you can combine multiple filters - will you be able to answer complex questions?	☐
Can you filter by time period?	Check for flexible date selection.	☐
Can you compare two user segments?	Check whether it's possible to compare two user segments, and find out if there's a visual way of seeing both volume and feedback for two segments side-by-side.	☐
Can you see how a theme changes over time?	Look at whether you can easily track changes in theme volume, as well as changes in score or impact for that theme on an overall metric.	☐
Can you identify which themes impact score?	Look for an analysis view comparing the impact of different themes on the overall metric.	☐
Can you quickly grasp metric changes over time?	Look for an analytics view showing why the metric of your choice has increased or dropped.	☐
Can you easily link feedback to financials?	Find out whether you can filter by financial metrics or use these in the same way as you would satisfaction scores, to easily link feedback to your financials.	☐
Can you export analyzed data?	Check whether you can download and export analyzed data, or pull it from the API.	☐
Are the dashboards easy to configure and use?	Check whether you can create dashboards that report on metrics as well as what's driving them. Look for both impact widgets and overall theme widgets.	☐

Reporting functionality and capability checklist continued

Capability	Criteria	
Can you customize the dashboard widgets?	Think about what your teams may need to track, such as score, comparison, themes on the rise and impact, and match these to the widgets on offer for dashboard customization.	☐
Can you create Powerpoint reports?	If Powerpoint is a common way of reporting in your company, check whether you can create a Powerpoint report by exporting data in PPTX format and editing it.	☐
Can you send reports and updates via email and slack?	Check whether you can sign different people to receive relevant reporting info via email, or slack. Find out what notifications are available to alert you on changes in themes, emerging themes, or specific words popping up in your feedback.	☐
Can you aggregate feedback into a single picture explaining how the company is doing overall?	Check what options are available to explain how your company is doing overall. You're looking at whether you can aggregate not only different scores into a single metric, but also different kinds of datasets: live chat, complaints and online reviews.	☐
Can you add different user roles and set their permissions?	Check whether it's possible to add different user roles and set their permissions in a granular way.	☐

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