

# A wealth management firm streamlines and secures survey data and plans their COVID-19 response with SurveyMonkey Enterprise

## Introduction

This case study of a medium enterprise financial services company is based on a June 2020 survey of SurveyMonkey Enterprise customers by TechValidate, a 3rd-party research service. The profiled company asked to have their name blinded to protect their confidentiality.



“SurveyMonkey Enterprise allows me to run a high volume research operation from my desk and it’s quick and easy to use. We are trying to work out what the next moves are with our workforce [with respect to COVID-19] and the data we collected with Enterprise made a lot of things clear very quickly.”

## Challenges

The complexity associated with multiple survey accounts and platforms to support led the business to evaluate and select Enterprise. The customer needed an enterprise-grade platform and Enterprise ticked key boxes.

## Use Case

The business sends surveys with SurveyMonkey Enterprise at a regular cadence and when they need to make strategic business decisions.

Data that SurveyMonkey Enterprise helps their organization to collect:

- Customer feedback about their experiences and sentiments
- Employees and candidate feedback about their experiences and sentiments
- Data to support their COVID-19 decision-making with respect to resource and business planning
- COVID-19-related health and wellness data from customers or employees
- COVID-19-related needs assessments with customers, employees or communities
- Planning / proposed change feedback from customers, employees or communities
- Market/public feedback, such as competitive analysis, concept testing, public awareness, etc.

The customer describes SurveyMonkey Enterprise’s abilities as highly impactful to their efforts to:

- Listen to stakeholders at scale, collect data that’s critical to objectives, and improve responses rates
- Make evidence-based, inclusive decisions about planning, policy and change
- Share survey results and collaborate cross-functionally

SurveyMonkey Enterprise has also helped the customer:

- centralize ownership and control of their survey data in a distributed workforce
- give employees the right access level they need when it comes to survey data
- consolidate survey programs under one account and get complete visibility into overall survey usage
- reduce the risk of collecting insecure, sensitive information
- reduce the risk of employee usage of shadow survey software

## Results

The surveyed company achieved the following results with SurveyMonkey Enterprise:

- Less time spent on the survey process, more time to focus on research and insights
- Improvements to employee insights, engagement and increased productivity
- Improvements to customer insights, experience, and increased customer lifetime value
- Improved business agility powered by richer feedback data and wider access to it
- Richer insights into the employee and customers experiences that drive critical outcomes

With SurveyMonkey Enterprise, the customer has seen:

- a 25% reduction in time spent on managing the survey process and users
- a 25% improvement in response rates and data quality
- a 25% improvement in customer experience metrics
- a 25% improvement in their ability to make strategic decision, faster
- a 25% improvement in their employee engagement metrics

### Company Profile

The company featured in this case study asked to have its name publicly blinded because publicly endorsing vendors is against their policies.

TechValidate stands behind the authenticity of this data.

Company Size:  
**Medium Enterprise**

Industry:  
**Financial Services**

### About SurveyMonkey Enterprise

From event feedback to sophisticated market research, SurveyMonkey Enterprise is your best choice. Get our best features to reduce bias, increase survey completion rates, and discover new data insights.

Learn More:

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