LoyaltyProfessional Reports and Analysis

LOYALTYPRO™

KNOW YOUR CUSTOMERS. KEEP YOUR CUSTOMERS.

Dashboard

1. Key Indicators
   - Loyalty Rating
   - Account Response Rating
   - Survey Response Rating

2. Standard Charts
   - Accounts by Rating
   - Surveys by Rating
   - Loyalty Trend vs. Target
   - Loyalty Rating by Section

3. Alerts < 50%
   - Deeper analysis can be done by filtering the data to show ratings by specific criteria, i.e. only show ratings for surveys that fall in the Chemical market.

Loyalty Ratings

Account Name	Contact Name	Business Unit	Market Segment	Role	Loyalty Rating	Completed Date
Chatham Corporation	Sheryl Chatham	Research	Healthcare		84%	/3/2009
Cinek Corporation	Erin Cinek	Customer Service	Chemical		69%	/6/2009
Colahan Corporation	Laurie Colahan	Key Accounts	Healthcare		83%	/6/2009
Crain Corporation	Dwight Crain	Sales	Healthcare		57%	/10/2009
Crook Corporation	John Crook	Research	Healthcare		83%	/7/2009
Danna Corporation	Diana Danna	Customer Service	Healthcare		77%	/3/2009
Deighton Corporation	Steve Deighton	Key Accounts	Chemical		77%	/3/2009
Dews Corporation	Justin Dews	Research	Technology		88%	/3/2009
Duckett Corporation	Dawn Duckett	Key Accounts	Chemical		90%	/3/2009
			Healthcare		72%	/3/2009
			Chemical		90%	/3/2009
			Healthcare		71%	/3/2009
			Healthcare		55%	/3/2009
			Chemical		60%	/3/2009
			Healthcare		73%	/6/2009
			Healthcare		95%	/3/2009
			Healthcare		71%	/23/2009
			Chemical		55%	/3/2009
			Healthcare	gfdgfdgfd	41%	/2009
			Healthcare		79%	/7/2009

Roll-up Gap Analysis

Filter ▾   Survey: **Standard Loyalty Survey**

How would you rate the overall performance of your Account Manager?	Excellent	18	34.6%	87%
	Good	28	53.8%	
	Average	6	11.5%	
	Poor	2		

The Company Experience (77%)	Choice	Count	Percent	Rating
6 Do you consider our programs and services to be client focused?	Yes	94	83.9%	83%
	No	18	16.1%	
5 We work in partnership with your organization.	Strongly Agree	25	22.3%	58%
	Agree	75	67.0%	
	Disagree	12	10.7%	
	Strongly Disagree	0	0.0%	
8 Has the quality of our programs and services...	Improved	45	40.2%	
	Remained the Same	65	58.0%	
	Worsened	2	1.8%	
5 How easy is our company to deal with relative to other companies?	Very Easy	25	22.3%	82%
	Easy	77	68.8%	
	Somewhat Difficult	10	8.9%	
	Difficult	0	0.0%	

LOYALTY RATINGS

Loyal	>= 75%
Caution	50-74.9%
Alert	25-49.9%
Critical	< 25%

- Loyalty Ratings are Color Coded using the Stop a stop light metaphor
- Percentages for users who relate to numbers
- Easy to identify an account or contact who is in Alert/Critical status because of the orange/red color rating.
- Roll-up Gap Analysis reports include rating colors to identify overall ratings for each section of the survey and questions are color coded based on overall ratings for that question.

LOYALTYPRO™
KNOW YOUR CUSTOMERS. KEEP YOUR CUSTOMERS.

Reports; Top-Line Summary
Additional Available

From Individual Page	From Reports Page	From Export Page
Completed Surveys	Company Summary	Completed Surveys
Pending Surveys	Survey Comments by Question	Pending Surveys
Roll-up Gap Analysis		Accounts
Accounts		Contacts
Contacts		Employees
Employees		Survey Comments by Question
		Survey Ratings by Contact
		Any Query created where user checked the box for the query to be exportable

Example of Roll-up Gap Analysis Report

- Consolidates all survey results into one view, by question, that can be filtered and analyzed as appropriate.

- Used to create an Action Plan to address those key areas highlighted by red. Yellow, green color-coding.

- Can view with or without comments .

Example of the Company Summary Report

- The Company Summary report which gives you an overview of an account and includes the following information: Quick Facts, Survey Respondents, Charts, Top 5 Rated Questions from the Survey, Bottom 5 Rated Questions from the Survey and Comments from the Survey.

Examples of Other Charts/Graphs

Top Box Analysis

Satisfaction with Overall Performance
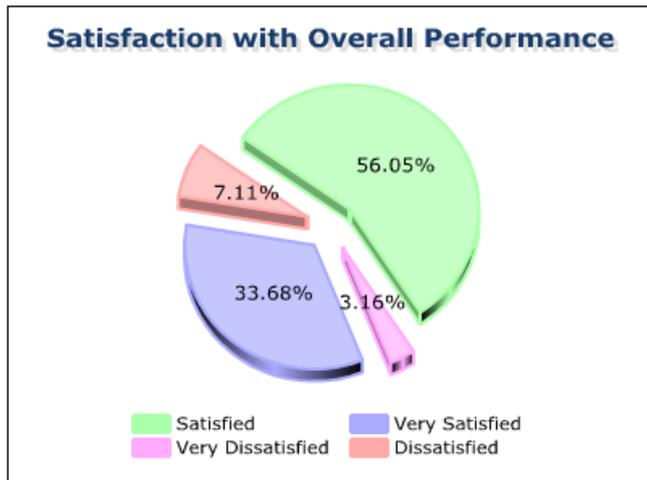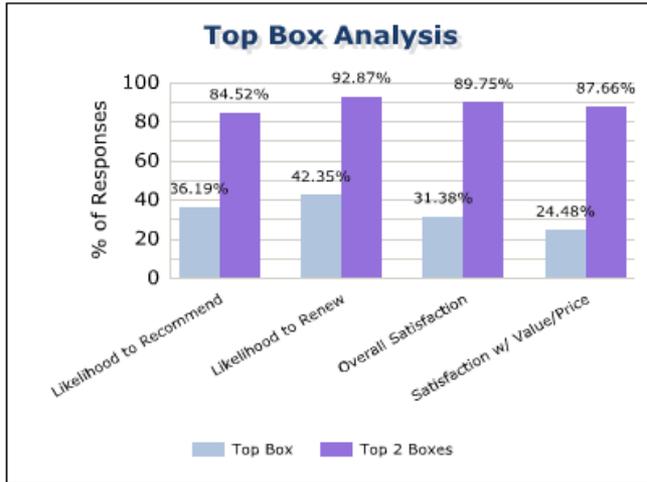
- Top Box Analysis
  - This chart shows the percentage of respondents that selected the top answer choice and the percentage of respondents that selected one of the top two answer choices. For example, using the following scale; Very Easy, Easy, Difficult, Very Difficult, the top box bar in the graph represents the percent of respondents who selected Very Easy, and the Top 2 Boxes bar represents the percent of respondents who select either Very Easy or Easy.
- Satisfaction with Overall Performance
  - This pie chart shows the breakdown of all responses for the given question in the survey. In this example, the question was "How satisfied are you with the overall performance of [Company]?" – any question in the survey can be used for this type of chart.

Examples of Other Charts/Graphs (cont.)

Relationships - How effective are the representatives you interact with at...

	Highly Effective	Effective	Needs Improvement	Not Effective	N/A
...Following through on commitments	21%	46%	9%	4%	17%
...Informing you about new products and services	12%	44%	10%	6%	26%
...Making you feel like a valued customer	24%	49%	9%	5%	11%
...Communicating in a clear and concise manner	22%	55%	8%	2%	10%

Legend: Highly Effective | Effective | Needs Improvement | Not Effective | N/A

- Header with multiple questions
  - This chart reflects a header question with multiple sub-questions. In this example, all sub-questions have the same answer choices and the breakdown of responses for each sub-question is provided.

LOYALTYPRO™
KNOW YOUR CUSTOMERS. KEEP YOUR CUSTOMERS.

Examples of Other Charts/Graphs (cont.)

**Overall Loyalty Ratings**

Loyalty Rating by Section
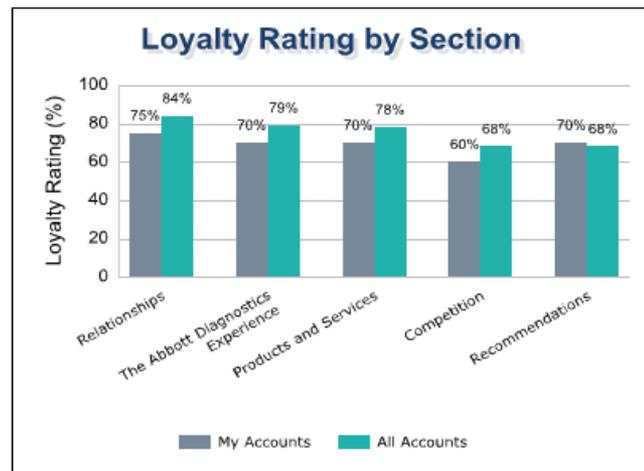
- Overall Loyalty Rating Comparison –
  - Shows the overall loyalty rating across all respondents as compared to the overall loyalty rating for the accounts / data I have access to in the system (i.e. as an account manager, "My Accounts", as an administrator, these numbers will be the same since an administrator has access to all data). This is a click thru chart that allows the user to click on the bar for My Accounts. This will show only the data the

- Loyalty Rating by Section Comparison –
  - Shows the overall section rating for all respondents as compared to the overall section rating for the accounts / data I have access to in the system (i.e. as an account manager, "my accounts", as an administrator, these ratings will be the same since an administrator has access to all data). This is a click thru chart that allows the user to click on the bar for My Accounts. This will show only the data the user has access to in the system.

LOYALTYPRO™
KNOW YOUR CUSTOMERS. KEEP YOUR CUSTOMERS.

Examples of Other Charts/Graphs (cont.)

RATINGS BY ACCOUNT MANAGER
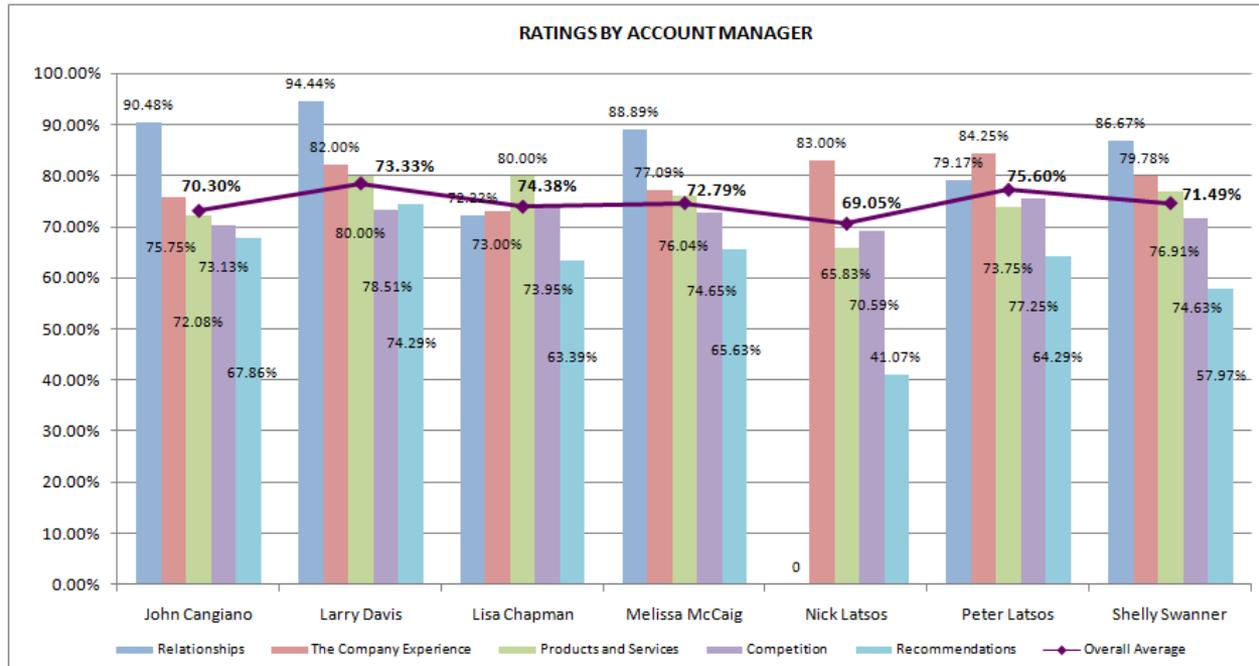
	Ratings by Section by Account Manager					
Account Managers	**Relationships**	**The Company Experience**	**Products and Services**	**Competition**	**Recommendations**	**Overall Average**
John Cangiano	90.48%	75.75%	72.08%	70.30%	67.86%	73.13%
Larry Davis	94.44%	82.00%	80.00%	73.33%	74.29%	78.51%
Lisa Chapman	72.22%	73.00%	80.00%	74.38%	63.39%	73.95%
Melissa McCaig	88.89%	77.09%	76.04%	72.79%	65.63%	74.65%
Nick Latsos	-	83.00%	65.83%	69.05%	41.07%	70.59%
Peter Latsos	79.17%	84.25%	73.75%	75.60%	64.29%	77.25%
Shelly Swanner	86.67%	79.78%	76.91%	71.49%	57.97%	74.63%
Average	**87.25%**	**78.28%**	**75.90%**	**72.51%**	**63.27%**	**74.70%**

Examples of Other Charts/Graphs (cont.)

Ratings and Response Rates by Business Unit
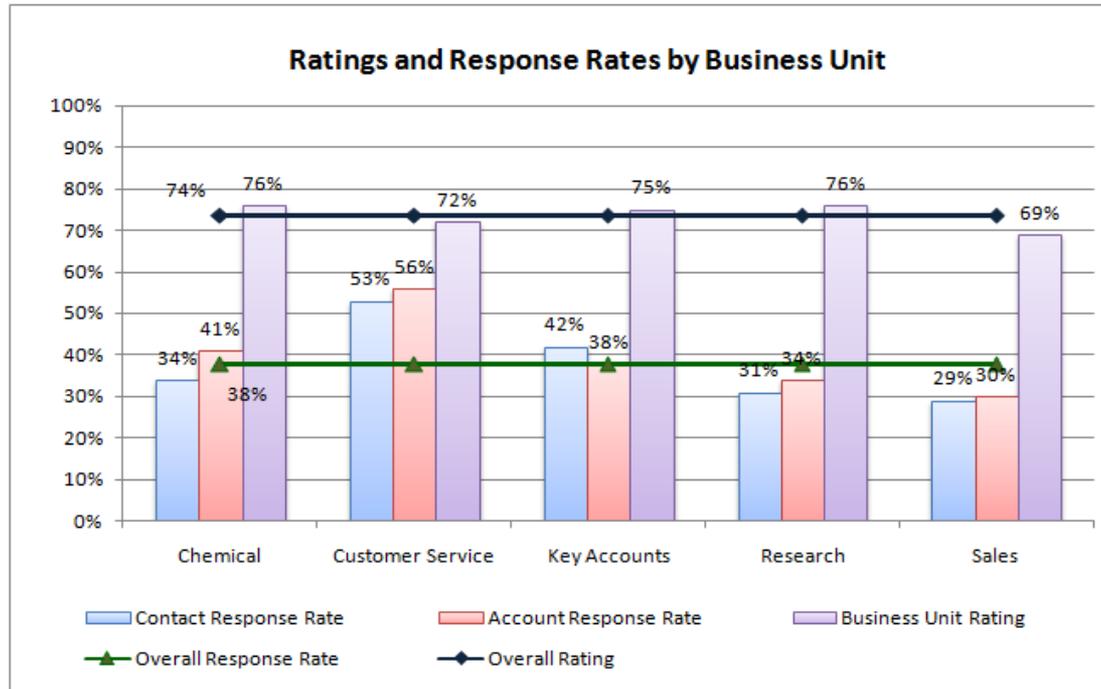
Business Unit	Contact Response Rate	Account Response Rate	Overall Response Rate	Business Unit Rating	Overall Rating
Chemical	34%	41%	38%	76%	74%
Customer Service	53%	56%	38%	72%	74%
Key Accounts	42%	38%	38%	75%	74%
Research	31%	34%	38%	76%	74%
Sales	29%	30%	38%	69%	74%
Grand Total	38%	40%	38%	74%	74%

Examples of Indicators

Loyalty Rating	Combined NPS	Upper Middle Market NPS	Small Market NPS
75	27	66	27

Response Rate	Large Market NPS	Middle Market NPS	Account Response Rate
19% (380/1997)	35	12	27% (355/1584)

- Indicators
  - Additional indicators can be added to your dashboard to reflect NPS scores and/or other ratings that have been used in previous reports or will be used for reporting on results going forward.