

# LoyaltyProfessional Reports and Analysis



# 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%	7/3/2009
Cinek Corporation	Erin Cinek	Customer Service	Chemical		69%	7/6/2009
Colahan Corporation	Laurie Colahan	Key Accounts	Healthcare		83%	7/6/2009
Crain Corporation	Dwight Crain	Sales	Healthcare		57%	7/10/2009
Crook Corporation	John Crook	Research	Healthcare		83%	7/7/2009
Danna Corporation	Diana Danna	Customer Service	Healthcare		77%	7/3/2009
Deighton Corporation	Steve Deighton	Key Accounts	Chemical		77%	7/3/2009
Dews Corporation	Justin Dews	Research	Technology		88%	7/3/2009
Duckett Corporation	Dawn Duckett	Key Accounts	Chemical		90%	7/3/2009
			Healthcare		72%	7/3/2009
			Chemical		90%	7/3/2009
			Healthcare		71%	7/3/2009
			Healthcare		55%	7/3/2009
			Chemical		60%	7/3/2009
			Healthcare		73%	7/6/2009
			Healthcare		95%	7/3/2009
			Healthcare		71%	7/23/2009
			Chemical		55%	7/3/2009
			Healthcare	gfdgdgfd	41%	7/3/2009
			Healthcare		79%	7/7/2009

## Roll-up Gap Analysis

Filter ▾ Survey: **Standard Loyalty Survey**

Question	Choice	Count	Percent	Rating
How would you rate the overall performance of your Account Manager?	Excellent	18	34.6%	<b>87%</b>
	<b>Good</b>	<b>28</b>	<b>53.8%</b>	
	Average	6	11.5%	
<b>The Company Experience (77%)</b>				
6 Do you consider our programs and services to be client focused?	<b>Yes</b>	<b>94</b>	<b>83.9%</b>	<b>83%</b>
	No	18	16.1%	
5 We work in partnership with your organization.	Strongly Agree	25	22.3%	<b>58%</b>
	<b>Agree</b>	<b>75</b>	<b>67.0%</b>	
	Disagree	12	10.7%	
	Strongly Disagree	0	0.0%	
8 Has the quality of our programs and services...	Improved	45	40.2%	
	<b>Remained the Same</b>	<b>65</b>	<b>58.0%</b>	
	Worsened	2	1.8%	
5 How easy is our company to deal with relative to other companies?	Very Easy	25	22.3%	<b>82%</b>
	<b>Easy</b>	<b>77</b>	<b>68.8%</b>	
	Somewhat Difficult	10	8.9%	
	Difficult	0	0.0%	

### LOYALTY RATINGS

<b>Loyal</b>	<b>&gt;= 75%</b>
<b>Caution</b>	<b>50-74.9%</b>
<b>Alert</b>	<b>25-49.9%</b>
<b>Critical</b>	<b>&lt; 25%</b>

- 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.

# 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

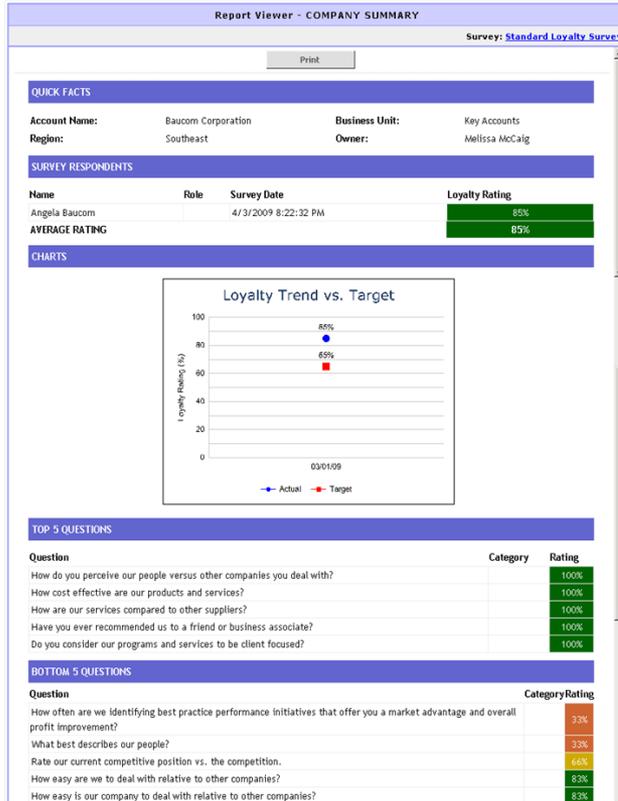
*Any Query created where user checked the box for the query to be exportable*

# Example of Roll-up Gap Analysis Report

Roll-up Gap Analysis			
Filter ▾		Survey: <a href="#">Standard Loyalty Survey</a>	
Show Comments		Print	
<b>Loyalty Rating</b>	<b>Account Response Rate</b>	<b>Survey Response Rate</b>	
74%	65% (108/153)	67% (111/165)	
<b>Welcome</b>			
	<b>Choice</b>	<b>Count</b>	<b>Percent Rating</b>
1 Are you [Contact Name]?	Yes	112	100.0%
	No	0	0.0%
2 What best describes your role in the decision making process?	Sole decision maker	13	11.6%
	Part of the decision making team	33	29.5%
	<b>Provide input &amp; recommendations</b>	47	42.0%
	Not involved in the process	19	17.0%
2 How long have you personally had a relationship with our company?	<b>Less than 1 Year</b>	56	50.0%
	1-3 Years	31	27.7%
	4-5 Years	8	7.1%
	More than 5 Years	17	15.2%
<b>Relationships (87%)</b>			
	<b>Choice</b>	<b>Count</b>	<b>Percent Rating</b>
2 Are you able to rate your Account Manager?	Yes	52	46.4%
	No	60	53.6%
Please tell us why you cannot rate your Account Manager.	They are not assigned to my account	17	27.4%
	They are too new to my account	4	6.5%
	<b>Interactions are too infrequent</b>	27	43.5%
	Other	14	22.6%
1 How long have you and your Account Manager worked together?	Less than 6 months	6	11.5%
	6 to 12 months	15	28.8%
	<b>1 to 3 years</b>	23	44.2%
	More than 3 years	8	15.4%
<b>Please rate your Account Manager in each of the following areas:</b>			
1 ...Communicating in a clear and concise manner	Excellent	16	30.8%
	<b>Good</b>	26	50.0%
	Average	9	17.3%
	Poor	1	1.9%

- 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



### COMMENTS

Welcome

What best describes your role in the decision making process?

Name	Comment
Angela Baucom	About 25% of the time I am part of the decision-making team, and about 75% of the time I am providing my recommendations based on specified reasons.

Relationships

[Please rate your Account Manager in each of the following areas:] ...Informing you about new products and services

Name	Comment
Angela Baucom	Melissa is good at her role; her role is not so much about keeping me informed of new product/services, so this is really N/A -- but N/A was not an option on the answers.

[Please rate your Account Manager in each of the following areas:] ...Conducting meaningful business reviews with you

Name	Comment
Angela Baucom	I would say she reports the business results, but does not conduct reviews.

Products and Services

Considering all of the products and services we provide to your organization, how well are we meeting your expectations?

Name	Comment
Angela Baucom	The multiple choice answers on these buttons on this particular question are running off the button and are being truncated. I cannot completely read the buttons and also the word "Expectations" is wrapping so that Expectation is on one line and the "s" is on the next line. Need bigger buttons on this one so the text can fit.

Competition

Rate our current competitive position vs. the competition.

Name	Comment
Angela Baucom	You really need to consider advertising more. I see your competitor having booths at conferences, advertisements in major publications, but I do not see you at these shows or in these publications.

Recommendations

Have you ever recommended us to a friend or business associate?

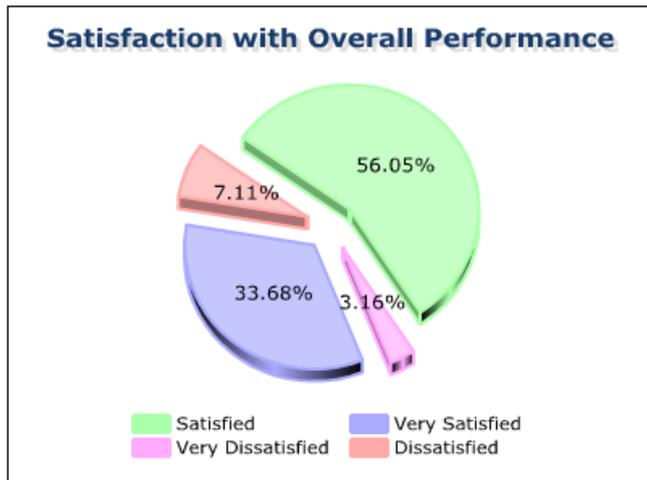
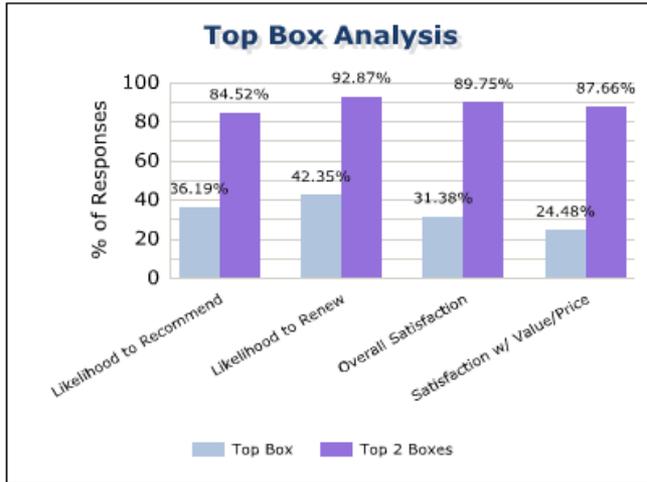
Name	Comment
Angela Baucom	I have recommended services, but also as a fine place of employment

What do we do well? (Select all that apply)

Name	Comment
Angela Baucom	I am a strong critic of project management and you do it well.

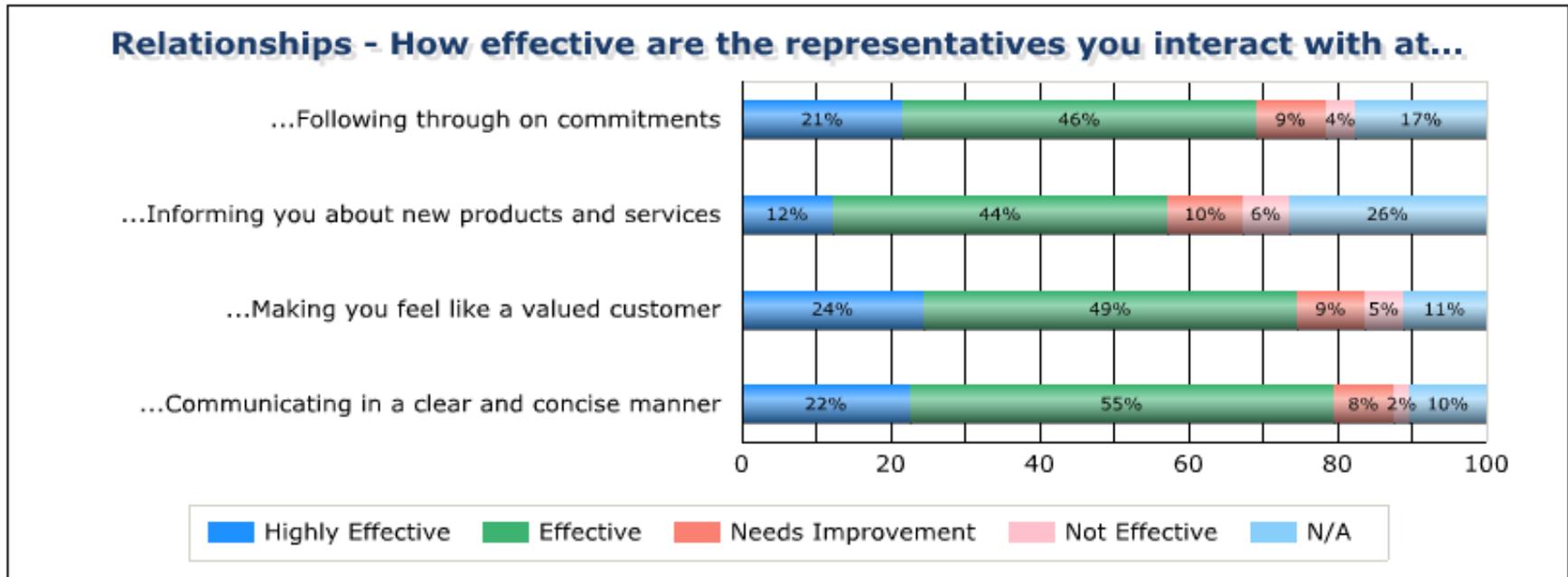
- The Company Summary report which gives you an overview of an account and includes the following information: Quick Facts, Survey Respondents, Charts, Top 5 Rated Questions from the Survey, Bottom 5 Rated Questions from the Survey and Comments from the Survey.

# Examples of Other Charts/Graphs



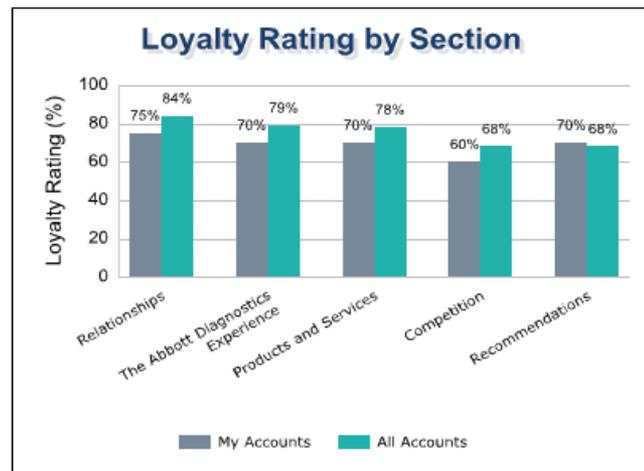
- **Top Box Analysis**
  - This chart shows the percentage of respondents that selected the top answer choice and the percentage of respondents that selected one of the top two answer choices. For example, using the following scale; Very Easy, Easy, Difficult, Very Difficult, the top box bar in the graph 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.)



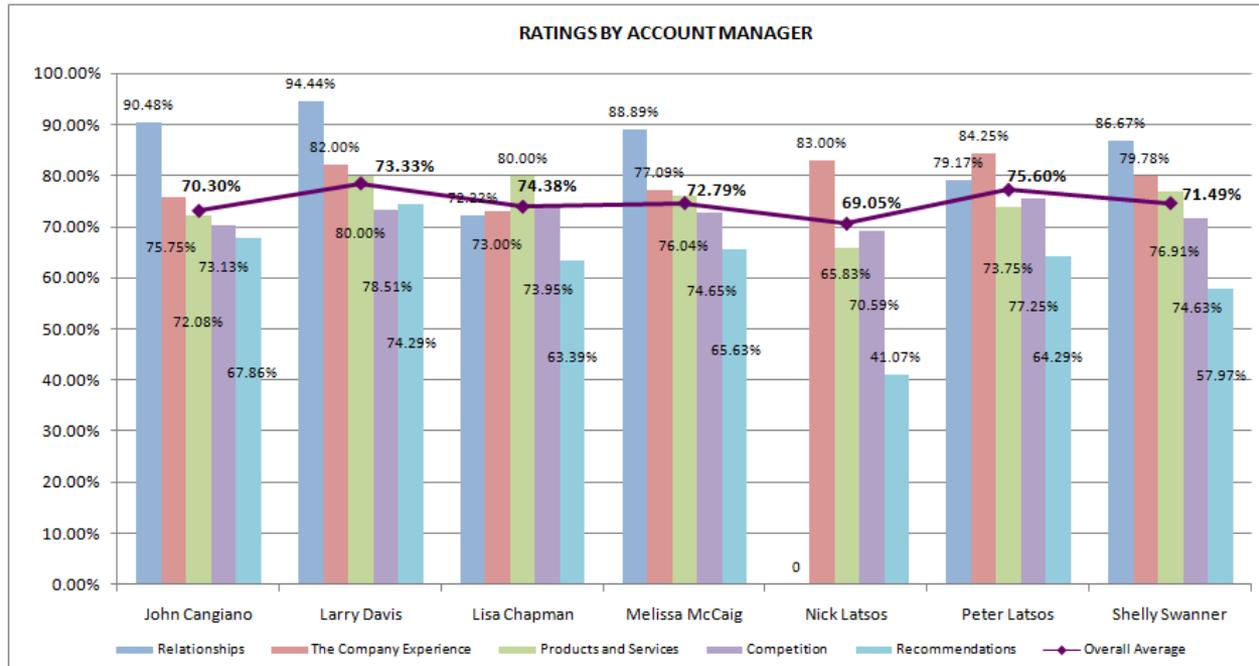
- Header with multiple questions
  - This chart reflects a header question with multiple sub-questions. In this example, all sub-questions have the same answer choices and the breakdown of responses for each sub-question is provided.

# Examples of Other Charts/Graphs (cont.)



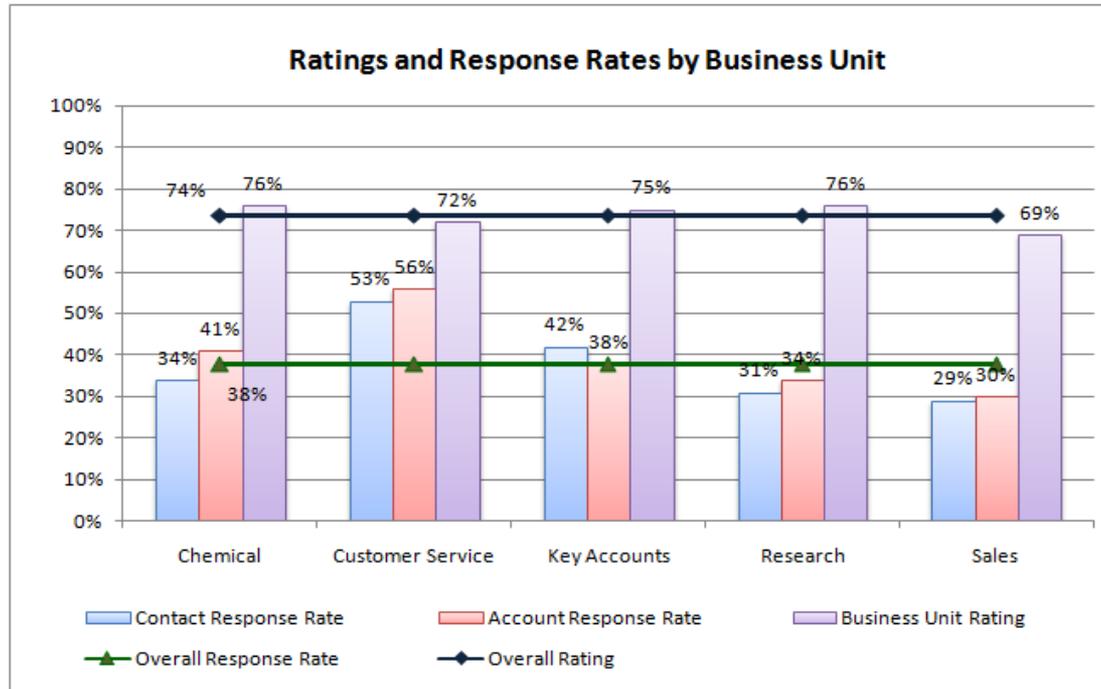
- Overall Loyalty Rating Comparison –
  - Shows the overall loyalty rating across all respondents as compared to the overall loyalty rating for the accounts / data I have access to in the system (i.e. as an account manager, “My Accounts”, as an administrator, these numbers will be the same since an administrator 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.

# Examples of Other Charts/Graphs (cont.)



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%
<b>Average</b>	<b>87.25%</b>	<b>78.28%</b>	<b>75.90%</b>	<b>72.51%</b>	<b>63.27%</b>	<b>74.70%</b>

# Examples of Other Charts/Graphs (cont.)



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%
<b>Grand Total</b>	<b>38%</b>	<b>40%</b>	<b>38%</b>	<b>74%</b>	<b>74%</b>

# Examples of Indicators

<b>Loyalty Rating</b>	<b>Combined NPS</b>	<b>Upper Middle Market NPS</b>	<b>Small Market NPS</b>
<b>75</b>	<b>27</b>	<b>66</b>	<b>27</b>
<b>Response Rate</b>	<b>Large Market NPS</b>	<b>Middle Market NPS</b>	<b>Account Response Rate</b>
<b>19%</b> <b>(380/1997)</b>	<b>35</b>	<b>12</b>	<b>27%</b> <b>(355/1584)</b>

- 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.