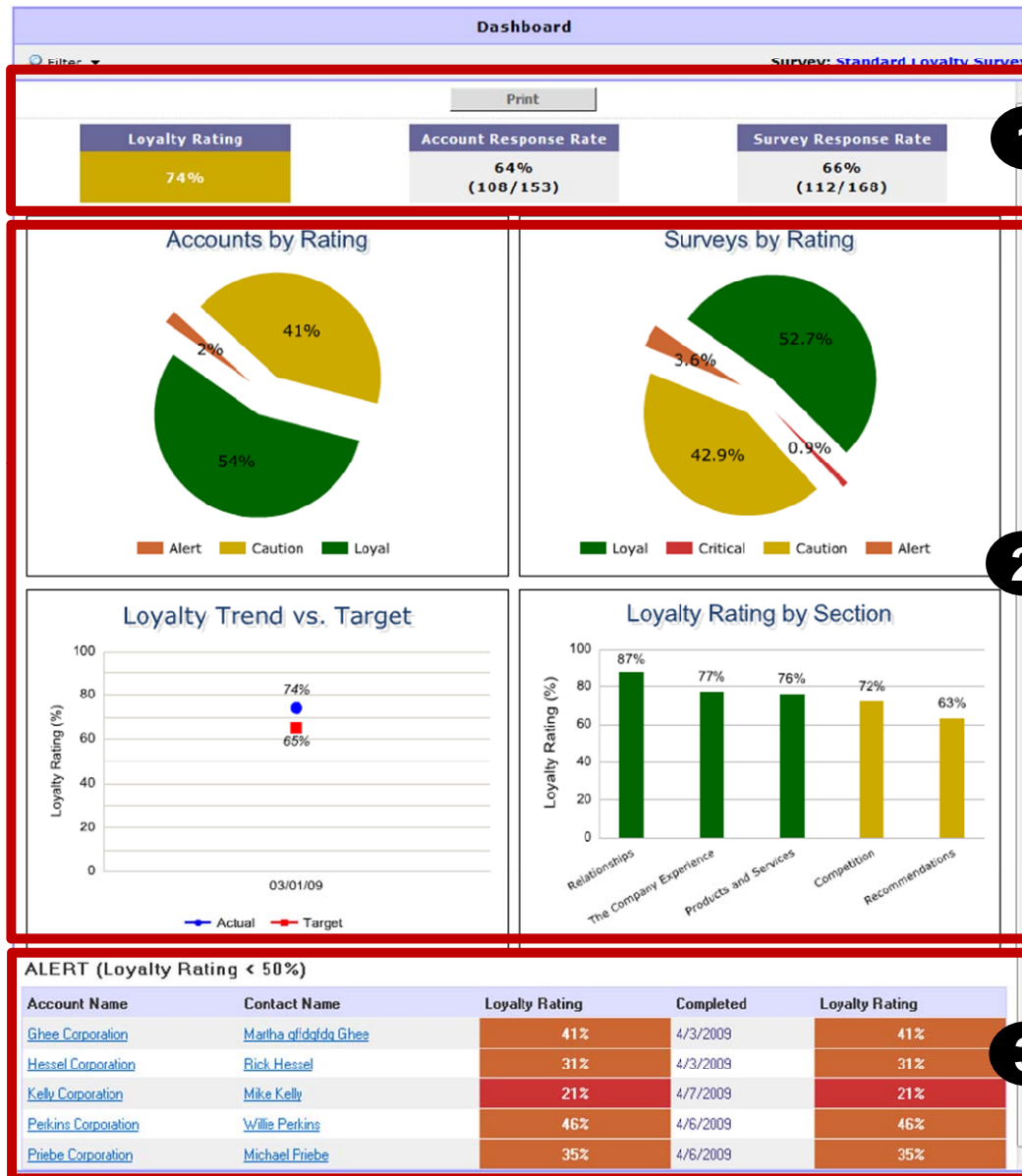


LoyaltyPro 5.0 Components

Dashboard



1. Key Indicators

- Loyalty Rating
- Account Response Rating
- Survey Response Rating

2. Standard Charts

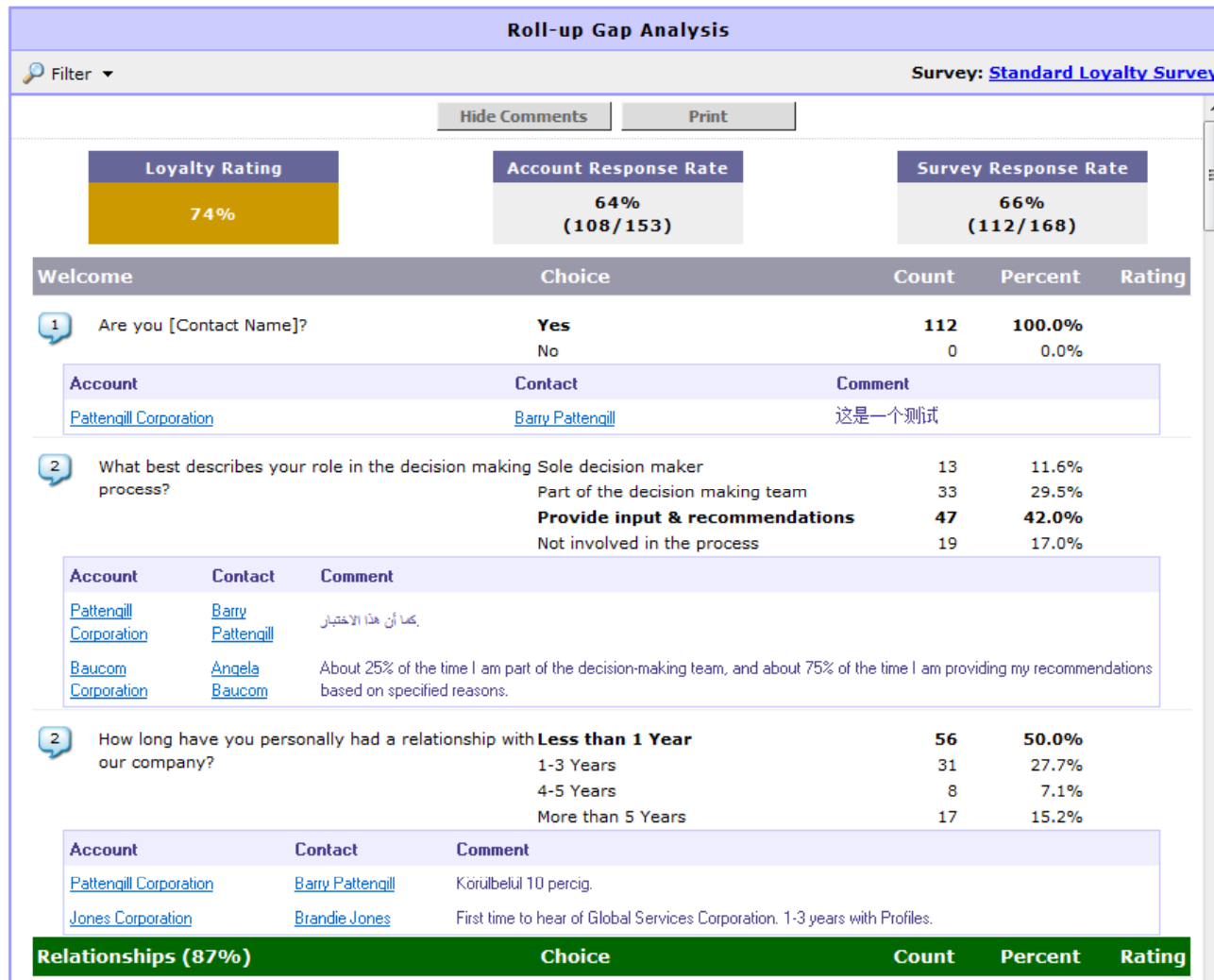
- Accounts by Rating
- Surveys by Rating
- Loyalty Trend vs Target
- Loyalty Rating by Section

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.

Roll-up Gap Analysis

- The Roll-up Gap Analysis consolidate all survey results into one view that can be filtered and analyzed as appropriate. Comments for each question can also be viewed from within the Gap Analysis.



Filtering Data

LOYALTYPRO
Global Services Corporation | System Administrator | Thursday, June 25, 2009
Logout

Completed Surveys Survey: [Standard Loyalty Survey](#)

Filter Filter Select records where **all** of the following statements apply Open Clear Apply

Market Segment is equal to [Chemical](#)

add condition

Filter Name: Public Save

Print

77%

Account Name	Contact Name	Business Unit	Market Segment	Role	Loyalty Rating	Completed Date
Sappenfield Corporation	Patricia Sappenfield	Chemical	Chemical		75%	4/3/2009
Deighton Corporation	Steve Deighton	Key Accounts	Chemical		77%	4/3/2009
Stout Corporation	Yvonne Stout	Sales	Chemical		89%	4/3/2009
Pease Corporation	Bob Pease	Research	Chemical		96%	4/3/2009
Embry Corporation	Jim Embry	Research	Chemical		90%	4/3/2009
Kalina Corporation	Diane Kalina	Customer Service	Chemical		83%	4/6/2009

- To do deeper analysis, the Filtering functionality allows the user to filter data by certain conditions. For example: i.e. only show ratings for surveys that fall in the Market Segment Chemical.
- Filters can be *saved* for future use.
- Users can filter data on the following pages: Completed Surveys, Pending Surveys, Accounts, Contacts, Roll up Gap Analysis and Dashboard.

Email Templates

Email Templates

Test Save

Template Name
Standard Invitation

Template Type
Invitation

Sender Type
Organization

Subject
Merge Fields Add Expression
{TenantName} Loyalty Survey

Message

Css Class Inline style Normal Verdana Size Merge Fields Add Expression

Dear [Contact Name],

As part of our ongoing efforts to optimize the effectiveness of our entire organization with the goal of meeting our customers' expectations, you have been selected to answer a short series of questions to measure how well {TenantName} is focusing on your business needs and meeting your expectations.

Your input, experience, and opinions are very valuable to us. We have found that surveying our clients helps us

- Customizable Email Templates with full formatting ability
- Merge Fields to bring in contacts name, department or the survey link or name, etc.
- Set Sender to be organization name, account owner, current user or custom
- Test emails can be sent so that the user can receive the email in their inbox to view

List Manager

- The List Manager enables you to create and edit distribution lists to whom the survey will be sent

List Manager

List Name

Review Current List

<input type="checkbox"/>	Account Name	Contact Name	Email	Role	DefaultLanguage
<input type="checkbox"/>	Acme Group	Michelle Smith	jfrick@chapmanhq.com	Marketing	
<input type="checkbox"/>	First Company	John Underwood	jfrick@chapmanhq.com	Research Manager	
<input type="checkbox"/>	Tideland	Julie Frick	jfrick@chapmanhq.com	Sales	
<input type="checkbox"/>	Xylan	Julie Landis	jfrick@chapmanhq.com		

Survey Tracking

- From within a contact record, we can track all of the details of an individual survey including when it was sent, started and completed.

Contact Detail

Last Loyalty Rating

57%

Contact

First Name*

Middle Name

Last Name*

Suffix

Account Link*

Email*

Role

External ID*

DefaultLanguage

Inactive

Notes

Survey Tracking

Sent	Survey	Account	Respondent Key	Started	Completed	Language	Loyalty Rating
4/3/2009 3:28:21 PM	Standard Loyalty Survey	Wiggins Corporation	TAX7CDYR	4/13/2009 6:11:35 PM	4/13/2009 6:14:42 PM		57%

Survey Builder

- The Survey Builder allows the user to create and edit survey scripts from within the system.

The screenshot displays the Survey Builder interface with the following sections:

- Survey Properties:** Name: Standard Loyalty Survey, Status: None. Includes fields for Welcome Message and Completion Message, both with rich text editors.
- Survey Content:** A tree view showing sections: BOOKLET[1]: General, SECTION[1]: Welcome, SECTION[2]: Relationships, SECTION[3]: The Company Experience, and SECTION[4]: Products and Services. Each section contains a list of questions with their IDs and text.
- Question A_B_0 Configuration:** Question Type: Multiple Choice. Settings include: Allow Multiple Answers (unchecked), Answer Required (checked), Allow Comment (checked), Question Label (empty), Maximum Points (0), Save Answer to Column (< not set >), Question Text (What best describes your role in the decision making process?), Reporting Text (What best describes your role in the decision making process?), and Display Rule (empty).
- Answers Table:** A table with columns: Def, Key, Label, Len, Help, Pts. It lists two answer options: A (Sole decision maker) and B (Part of the decision making).

Def	Key	Label	Len	Help	Pts
<input type="checkbox"/>	A	Sole decision maker	0		0
<input type="checkbox"/>	B	Part of the decision making	0		0

Survey Translator

- The Survey Translator enables a user to be able to translate the survey script into their desired / needed languages.

Language Translations

Select Survey
Standard Loyalty Survey

Select Language-Country/Region
Spanish (Spain)

Language Translations
Use your computer's language settings to change the keyboard input language.

English	Spanish (Spain)
[Tenant(@TenantId)][TenantName] is committed to providing you the highest quality service possible. To ensure that we fully understand our performance relative to your expectations, we are conducting a survey of our key service areas. Your participation in the survey will assist us in:	[Not Set]
<ul style="list-style-type: none">Identifying areas where we exceeded your expectations.Identifying and prioritizing areas requiring improvement.	
The ratings and comments you provide will be shared with [Tenant(@TenantId)][TenantName] management and your Sales and Account Services team. The survey will take only a few minutes to complete – we thank you in advance for your participation.	
Thank you for participating in the [Tenant(@TenantId)][TenantName] Survey. Your valued input will provide us with information to improve our processes, and ultimately, help serve you better.	Gracias por participar en la Encuesta [Tenant(@TenantId)][TenantName] Survey. Su valiosa aportación nos proporcionará información para mejorar nuestros procesos y, en última instancia, ayudar a servir mejor.
Welcome	Bienvenido
Are you [Contact(@ContactId)][Moniker]?	[Not Set]
Yes	[Not Set]
No	[Not Set]
What is your name and email?	[Not Set]
What best describes your role in the decision making process?	[Not Set]
Sole decision maker	[Not Set]
Part of the decision making team	[Not Set]
Provide input & recommendations	[Not Set]
Not involved in the process	[Not Set]

Importing Data

- From the import function of the system, new data can be imported into the system (accounts, contacts, employees, team members / account assignments), or existing data can be updated.

Import

Step 2: Map Columns to Account Fields

CSV File: TestImport.csv
First row contains column headers

Target Table: Account
Overwrite duplicates

Mappings

Table Column	CSV Column	Link To Table
Account Name	ACCOUNT	
Account Owner *	OWNER	<input checked="" type="checkbox"/>
Address	ADDRESS	
Address 2	< none >	
Business Unit	< none >	
City	CITY	
Country	COUNTRY	<input checked="" type="checkbox"/>
External ID *	EXTERNALID	
Inactive	< none >	
Market Segment	MARKET SEGMENT	
Region	REGION	
State	STATE	
Status	< none >	
Zip Code	ZIP	

(*) Required

Query Builder

- Queries are a set of conditions that display certain information. They are used to generate and export reports or to display information on pages in tables or charts.

1

Query Builder

Survey: **Standard Loyalty Survey**

Create New Query

Select Query Template
 Individual Rating

Enter New Query Name
 Gaskin Test 1 Create

Edit Existing Query

Select Query
 Account List Edit

2

Query Properties

Query Name: Gaskin Test 1

Query Output

Type	Expression	Alias	Data Type	Aggregate	Sort Order	Sort Desc	Group	Replace
Table Column	# of Employees		Integer	None	None	<input type="checkbox"/>	<input type="checkbox"/>	add replacement
Table Column	Account		Text	None	None	<input type="checkbox"/>	<input type="checkbox"/>	add replacement

Query Criteria

[add condition](#)

3

Query Builder

Survey: **Standard Loyalty Survey**

Preview Save

Query Properties

Query Name: Gaskin Test 1 Allow results to be exported

Query Output

Type	Expression	Alias	Data Type	Aggregate	Sort Order	Sort Desc	Group	Replace
Table Column	Business Unit	Business Unit	NVarChar	None	None	<input type="checkbox"/>	<input checked="" type="checkbox"/>	add replacement
Table Column	Loyalty Rating	Rating	Decimal	Average	None	<input type="checkbox"/>	<input type="checkbox"/>	add replacement

[add result column](#)

Query Criteria

[add condition](#)

Preview

Business Unit	Rating
Chemical	65.44
Customer Service	72.91
Key Accounts	76.08
Research	76.47
Sales	69.37

Additional Administrative Functions

- There are a series of administrative functions also available in the system through the “Setup” function on the navigation bar. These administrative functions include:
 - Add pages (i.e. create multiple dashboards) and rename pages
 - Change icons associated with pages
 - Create your own exports
 - Add fields to account and contact records
 - Update drop down values
 - Set security at the field and page level (who can see, access and edit elements of the system)

Customization

LoyaltyPro Customization

Global Settings

ORGANIZATION SETTINGS

Data

QUERY BUILDER

PICK LIST EDITOR

IMAGE MANAGER

DATA DICTIONARY

Presentation

PAGE BUILDER

CHART BUILDER

MENU EDITOR

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	gfdgfdgfd	41%	7/3/2009
			Healthcare		79%	7/7/2009

Roll-up Gap Analysis					
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%			
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.

Reports

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 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.

Report Viewer - COMPANY SUMMARY

Survey: [Standard Loyalty Survey](#)

Print

QUICK FACTS

Account Name:	Baucom Corporation	Business Unit:	Key Accounts
Region:	Southeast	Owner:	Melissa McCaig

SURVEY RESPONDENTS

Name	Role	Survey Date	Loyalty Rating
Angela Baucom		4/3/2009 8:22:32 PM	85%
AVERAGE RATING			85%

CHARTS

Loyalty Trend vs. Target

Date	Actual (%)	Target (%)
03/01/09	85%	65%

TOP 5 QUESTIONS

Question	Category	Rating
How do you perceive our people versus other companies you deal with?		100%
How cost effective are our products and services?		100%
How are our services compared to other suppliers?		100%
Have you ever recommended us to a friend or business associate?		100%
Do you consider our programs and services to be client focused?		100%

BOTTOM 5 QUESTIONS

Question	Category	Rating
How often are we identifying best practice performance initiatives that offer you a market advantage and overall profit improvement?		33%
What best describes our people?		33%
Rate our current competitive position vs. the competition.		66%
How easy are we to deal with relative to other companies?		83%
How easy is our company to deal with relative to other companies?		83%

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.

Example of Survey Comments by Question Report

Report Viewer - Survey Comments by Question

Survey: [Standard Loyalty Survey](#)

Welcome

Are you [Contact Name]?

Account	Contact	Comment	Loyalty Rating
Pattengill Corporation	Barry Pattengill	这是一个测试	95%

What best describes your role in the decision making process?

Account	Contact	Comment	Loyalty Rating
Baucom Corporation	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.	85%
Pattengill Corporation	Barry Pattengill	عنا أن هذا الاختبار.	95%

How long have you personally had a relationship with our company?

Account	Contact	Comment	Loyalty Rating
Jones Corporation	Brandie Jones	First time to hear of Global Services Corporation. 1-3 years with Profiles.	72%
Pattengill Corporation	Barry Pattengill	Korubeldi 10 perctig.	95%

Are you able to rate your Account Manager?

Account	Contact	Comment	Loyalty Rating
Pattengill Corporation	Barry Pattengill	Shelly është e madhe për të punuar me t'vënd vendin dhe jetën time në duart e saj.	95%
Swanner Corporation	Shelly Swanner	test comments	95%

How long have you and your Account Manager worked together?

Account	Contact	Comment	Loyalty Rating
Swanner Corporation	Shelly Swanner	test comments	95%

Please rate your Account Manager in each of the following areas:

...Communicating in a clear and concise manner

Account	Contact	Comment	Loyalty Rating
Pattengill Corporation	Barry Pattengill	Ju shkonit gji!	95%

...Informing you about new products and services

Account	Contact	Comment	Loyalty Rating
Baucom Corporation	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.	85%

...Conducting meaningful business reviews with you

Account	Contact	Comment	Loyalty Rating
Baucom Corporation	Angela Baucom	I would say she reports the business results, but does not conduct reviews.	85%

The Company Experience

Do you consider our programs and services to be client focused?

Account	Contact	Comment	Loyalty Rating
Booth Corporation	Jane Booth	Unable to answer due to not having worked with Global Services	65%
Evans Corporation	Raylen Evans	I am not sure who Global Services is. I have only worked here for a short amount of time	55%
Hessel Corporation	Rick Hessel	I am unfamiliar with Global Services Corporation	31%

- Shows all comments submitted for each question on the survey across all accounts.
- Identifies any additional concerns or issues related to each question that the Account Team can address.
- Loyalty Ratings are shown using the colors from the ratings legend to easily identify areas of concern.

Example of Roll-up Gap Analysis Report

Roll-up Gap Analysis			
Filter		Survey: Standard Loyalty Survey	
Show Comments		Print	
Loyalty Rating	Account Response Rate	Survey Response Rate	
7.4%	65% (108/153)	67% (111/165)	
Welcome		Choice	Count Percent Rating
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%
		Provide input & recommendations	47 42.0%
		Not involved in the process	19 17.0%
2	How long have you personally had a relationship with our company?	Less than 1 Year	56 50.0%
		1-3 Years	31 27.7%
		4-5 Years	8 7.1%
		More than 5 Years	17 15.2%
Relationships (87%)		Choice	Count Percent Rating
2	Are you able to rate your Account Manager?	Yes	52 46.4%
		No	50 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%
		Interactions are too infrequent	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%
		1 to 3 years	23 44.2%
		More than 3 years	6 15.4%
Please rate your Account Manager in each of the following areas:			
1	...Communicating in a clear and concise manner	Excellent	16 30.8%
		Good	26 50.0%
		Average	9 17.3%
		Poor	1 1.9%
	...Responding promptly to your needs and requests	Excellent	25 48.1%
		Good	18 34.6%
		Average	6 15.4%
		Poor	1 1.9%
	...Making you feel like a valued customer	Excellent	23 44.2%
		Good	16 30.8%
		Average	11 21.2%
		Poor	2 3.8%
	...Understanding your business needs	Excellent	16 30.8%
		Good	20 38.5%
		Average	13 25.0%
		Poor	3 5.8%
	...Providing effective problem resolution	Excellent	17 32.7%
		Good	25 48.1%
		Average	7 13.5%
		Poor	3 5.8%

- An aggregated summary report itemized question by question of all responses received by LoyaltyPro™.
- The filtering functionality allows the user to cut and slice the data based on any data element in the system.
- Identifies areas at risk with the individual or account
- Used to create an Action Plan to address those key areas.
- Can view with or without comments

Example of Pending Surveys Report

- Shows a report of all incomplete surveys. From the Export page, this report can be exported into an Excel spreadsheet.

Global Services Corporation
Pending Surveys

Standard Loyalty Survey
Thursday June 25, 2009 3:06:44 PM

Account Name	Contact Name	Business Unit	Market Segment	Region	Role	Sent Date
Acme Group	Julie Frick	Sales	Healthcare	MidAtlantic	Account Manager	4/3/2009
Arsiaga Corporation	Manuel Arsiaga	Chemical	Chemical	Southeast		4/3/2009
Barber Corporation	Thomas Barber	Research	Healthcare	MidAtlantic		4/3/2009

Brum Corporation
Josh Brum

Cadell Corporation
Denise test Cadell

Carroll Corporation
NotLisa Carroll

Chapman Corporation
Denny Chapman

CRMUser Corporation
Temp CRMUser

Cymbol
Nick Latsos

Cymbol
Tim Shore

Dieterich Corporation
Jeremy Dieterich

First Company
John Underwood

Pending_Surveys[1] - Microsoft Excel

Home Insert Page Layout Formulas Data Review View

Cut Copy Paste Format Painter Clipboard Font Alignment Number

Calibri 11

Wrap Text Merge & Center

Account Id

Account Id	Account Name	Contact	Contact Name	Business Unit	Market Segment	Region	Role	Sent Date
3b66ae09-	Barber Corporation	d6834f4a-	Thomas B:	Research	Healthcare	MidAtlantic		4/3/2009 19:27
e420816a-	Cymbol	ae411f7a-	Nick Latsos	Research	Technology		Sales	4/3/2009 19:27
e9f09852-	CRMUser Corporation	e91e1c2f-	Temp CRM	Chemical	Chemical	Midwest		4/3/2009 19:27
bdd43f5e-	Tester Corporation	5fad0df9-	Project Te	Sales	Healthcare	Southwest		4/3/2009 19:27
3fa5b3a5-	Taylor Corporation	927f6daf-	Kelley Tay	Customer	Chemical	Midwest		4/3/2009 19:27
b951d0dc-	Smith Corporation	e03e0901-	Jennifer S	Key Account	Healthcare	Southwest		4/3/2009 19:28
45d86133-	Martinez Corporation	5f9018aa-	Carrie Mai	Key Account	Chemical	Midwest		4/3/2009 19:28
481d55a6-	User1 Corporation	e8687d15-	CRM User:	Chemical	Healthcare	MidAtlantic		4/3/2009 19:28
63514d29-	User Corporation	b6bc6eba-	Test2 User	Key Account	Chemical	Midwest		4/3/2009 19:28
fd278321-	User6 Corporation	b6ce37bf-	CRM User:	Customer	Healthcare	Northeast		4/3/2009 19:28
a86b2706-	McDonald	68967d77-	Mary McD	Research	Chemical	Northwest		4/3/2009 19:28
b6382b48-	Patel Corporation	f5c67039-	Rajesh Pat	Customer	Healthcare	Southwest		4/3/2009 19:28
e420816a-	Cymbol	4c791a42-	Tim Shore	Research	Technology		Research I	4/3/2009 19:28

