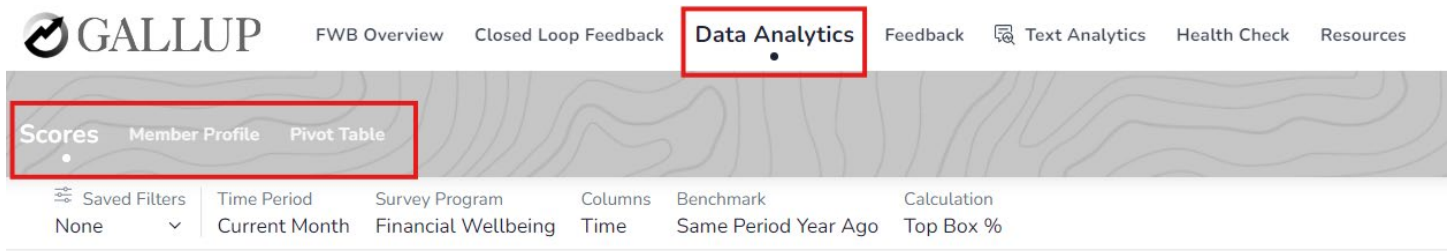


Medallia Reporting | Data Analytics

Data Analytics Tab

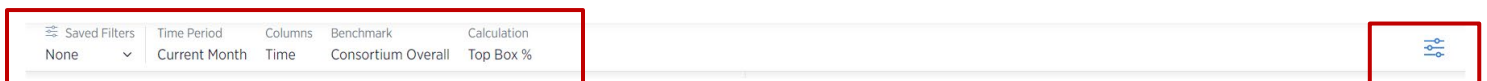
The **Data Analytics** tab enables users to quickly identify whether their scores are going up or down over time, provides item response details, and enables users to alter module criteria in order to analyze data quickly.

The Data Analytics tab includes three subtabs — **Scores**, **Member Profile**.



Filters | Control Panel

On each of the tabs and subtabs you will notice a control panel which enables you to filter the data shown in your report.



The left side of the control panel lists the **Time Period** and segment fields available for your role. The right side of the control panel includes **additional filters** that are available based on the various reporting tabs. Filters that appear will differ slightly between reporting tabs.

Time Period: Current Month

Unit: +

FWB Channel: +

Survey Program: Financial Wellbeing

Additional Filters: +

Columns: Time

Benchmark: Same Period Year Ago

Calculation: Top Box %

Reset Save Filter Run

Filter options on the Data Analytics tab include Time Period, Unit, FWB Channel, Survey Program, Additional Filters, Columns, Benchmark, Calculation and Comment Field. A visual of each is displayed below.

Time Period

Time Period: Current Month

Unit: ×

FWB Channel: ×

Survey Program: ×

Additional Filters

Current Month

Current Week

All Time

Last Month (Jan)

Current Quarter

Last Quarter

FWB Channel

FWB Channel: × +

Survey Program: ×

Additional Filters

Branch

Contact Center

Lending

Mobile/Online

General Member

Overall Satisfaction with

Additional Filters

Additional Filters

+

Search

- Member Age by Generation >
- Gender >
- Member Tenure >
- Problem Experienced >
- Problem Resolution >
- Problem Resolution Satisfaction >
- Problem Channel >
- Lending Problem Channel >
- Coronavirus Comment >
- Record Has Comment >

Overall Satisfaction with

57.6

Consortium Overall

Data Analytics

Calculation: Top Box %Time Pe

Additional Filters (sub options example)

Additional Filters

+

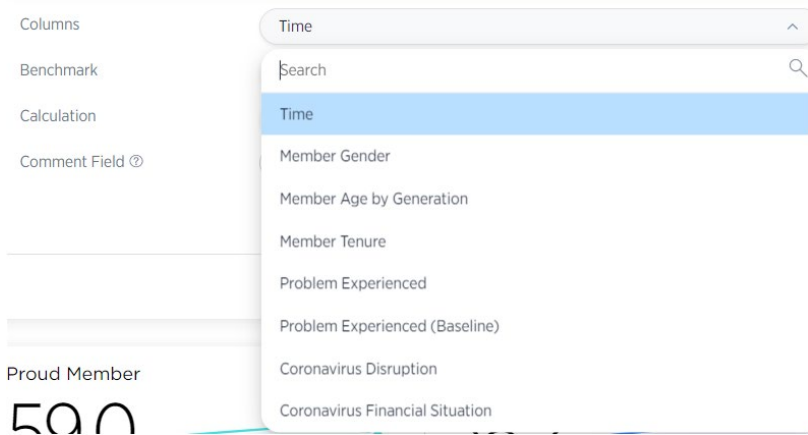
Search

< Problem Resolution

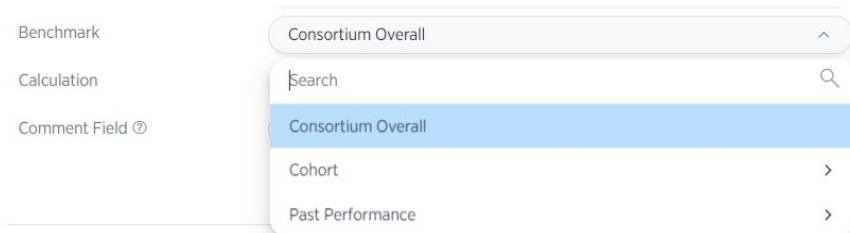
- Yes
- No

Overall Satisfaction with

Columns



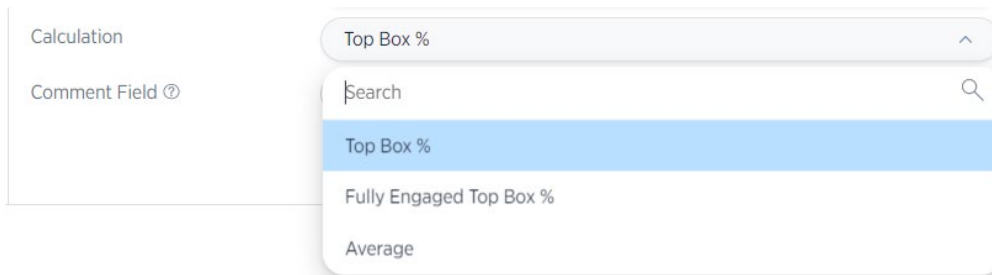
Benchmark



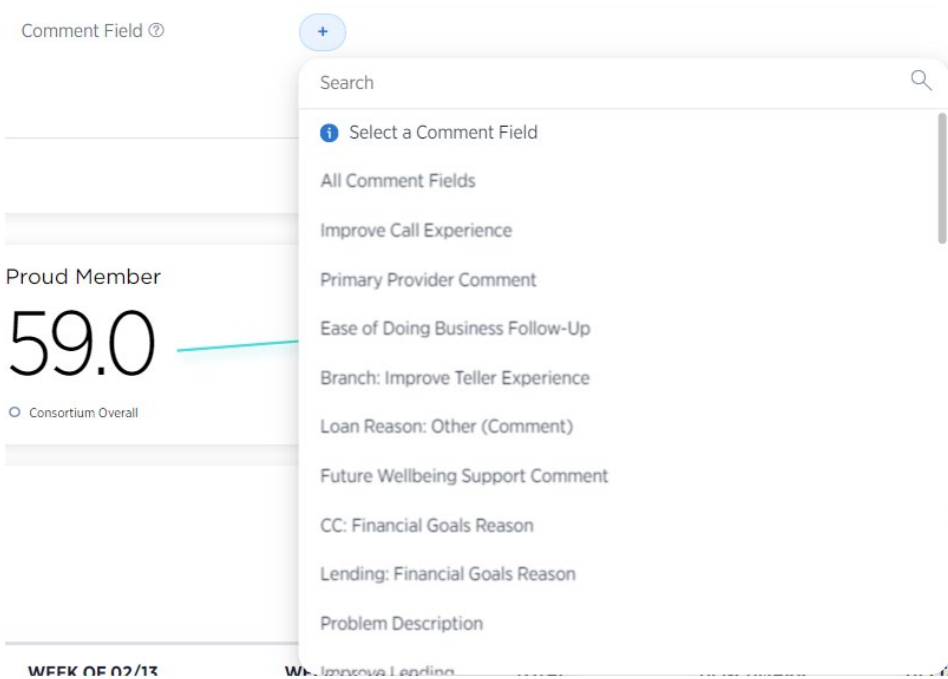
Calculation

By default, this tab displays mean scores for each item. However, use the Calculation filter in the control panel to view Top Box %.

Once you select the desired **Calculation**, click **Run** to view results.



Comment Field



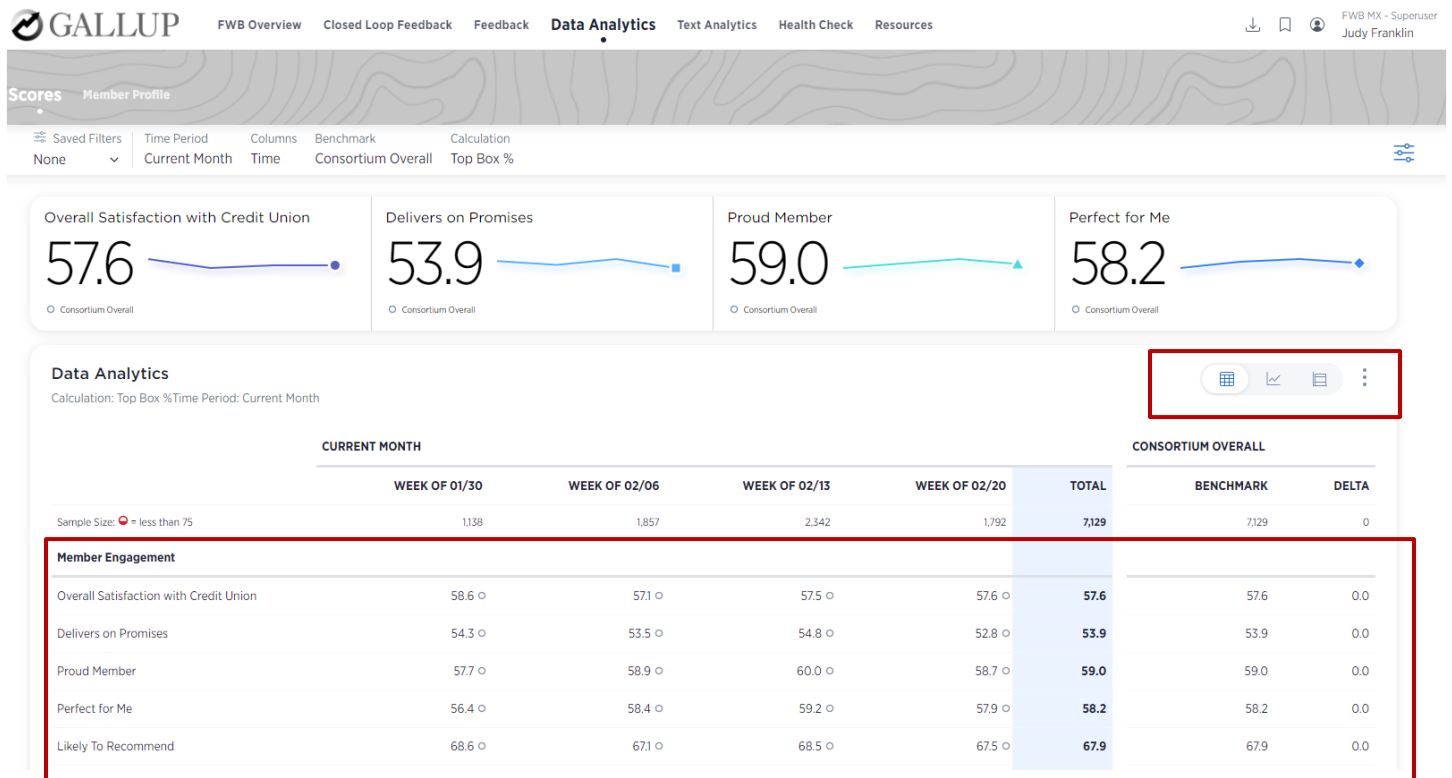
Analytics | Scores

Your **Scores** dashboard subtab includes all individual survey items compared to the Consortium Overall benchmark. The module also includes a delta to highlight gaps. This module enables users to quickly see whether their scores are going up or down over time. This is especially useful for monitoring progress against a target benchmark.

Satisfaction Table Visualization Option

Satisfaction Table reports show rating scale questions in a tabular format and is the default view for the Scores subtab.

Visualization options available are denoted with icons in the upper right corner of the module.



The report aggregates data based on the value chosen in the Control Panel filters.

- Use the **Calculation** dropdown to view Top Box %, Fully Engaged Top Box %, or Average.
- View segment data by selecting a value from the **Columns** dropdown
- **Benchmark** dropdown to view results against other segments.
- **Comment Field** to cut down the data for everything on the page to limit it to records that match specific topics, comment fields, and/or segments.

- Columns
- Benchmark
- Calculation
- Comment Field ⓘ

Time ▾

Consortium Overall ▾

Top Box % ▾

+ ○

Reset Save Filter Run

The first row in the table shows the sample size for each column. Rows with low sample sizes are in red, indicating that the results might not be statistically significant.

Data Analytics
Calculation: Top Box %Time Period: Current Month

	CURRENT MONTH				TOTAL	CONSORTIUM OVERALL	
	WEEK OF 01/30	WEEK OF 02/06	WEEK OF 02/13	WEEK OF 02/20		BENCHMARK	DELTA
Sample Size: ○ = less than 75	1,138	1,857	2,342	1,792	7,129	7,129	0
Member Engagement							

You can also view the statistical significance of your results at the end of the Satisfaction Table module (shown below)

Fraud	WEEK OF 01/30	WEEK OF 02/06	WEEK OF 02/13	WEEK OF 02/20	TOTAL	BENCHMARK	DELTA
% Yes Fraud Experience	13.3 ○	12.7 ○	12.3 ○	10.9 ○	12.2	12.2	0.0
Fraud Experience Overall Satisfaction	67.6 ○	64.9 ○	71.4 ○	64.6 ○	67.4	67.4	0.0
Fraud Handling: Advice and Guidance	56.2 ○	48.0 ○	58.0 ○	62.9 ○	57.2	57.2	0.0
Fraud Handling: Updates on Claim	56.2 ○	37.5 ○	56.7 ○	62.9 ○	54.9	54.9	0.0
Fraud Handling: Empathized	62.5 ○	50.0 ○	58.0 ○	68.6 ○	59.7	59.7	0.0
Fraud Handling: Feel Safe	68.8	48.0 ○	63.8 ○	68.6 ○	62.8	62.8	0.0
Fraud Handling: Easy Process	68.8	48.0 ○	67.1 ○	68.6 ○	64.4	64.4	0.0
Fraud Handling: Helped Research and Resolve	56.2 ○	48.0 ↓	68.6 ○	74.3 ○	65.1	65.1	0.0

SIGNIFICANCE TESTING

- ↑ Positive
- ↓ Negative
- Not Significant

Significance Level: **5%**

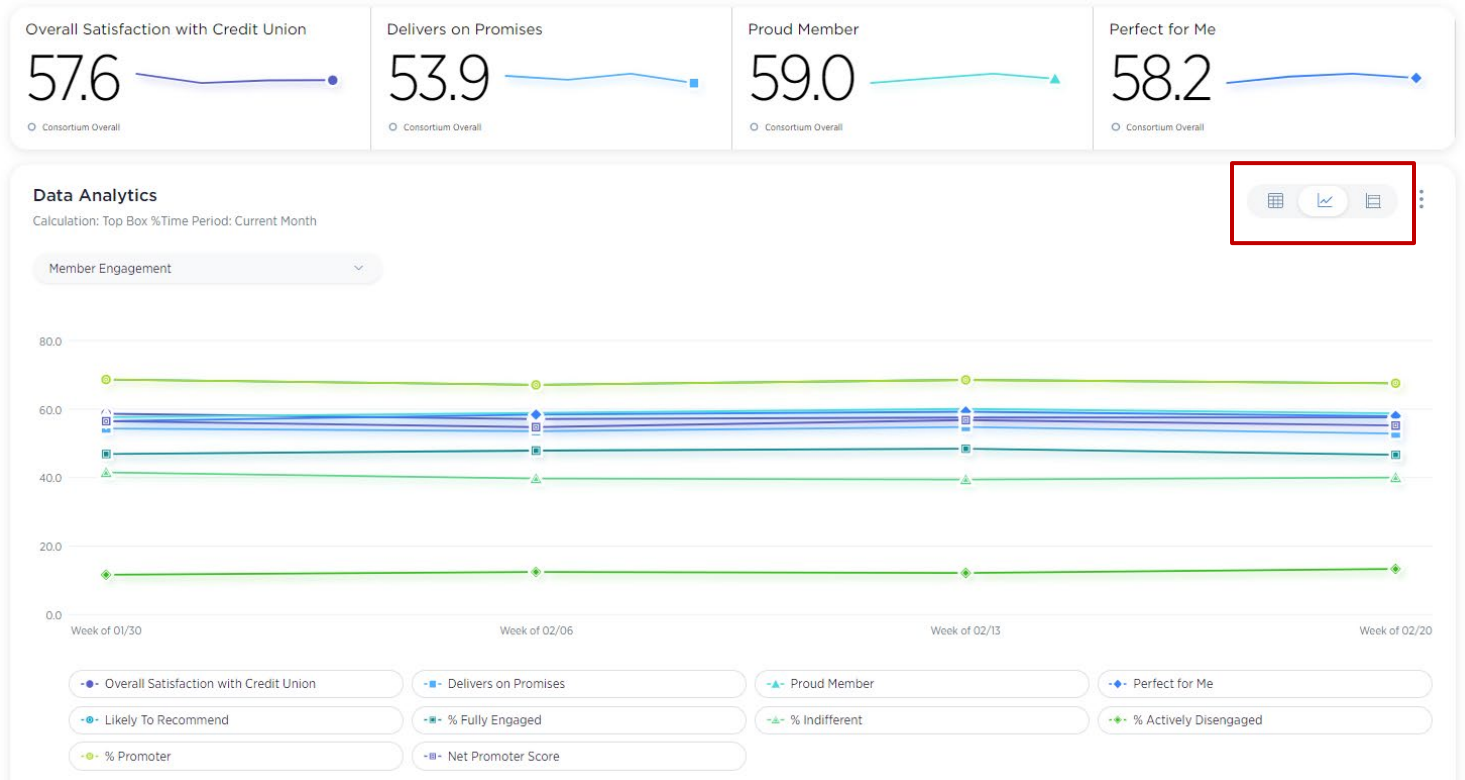
Comparison: **Adjacent column (left)**

Min. Sample Size: **1**

Min. Absolute Difference: **0**

Satisfaction Graph Visualization Option

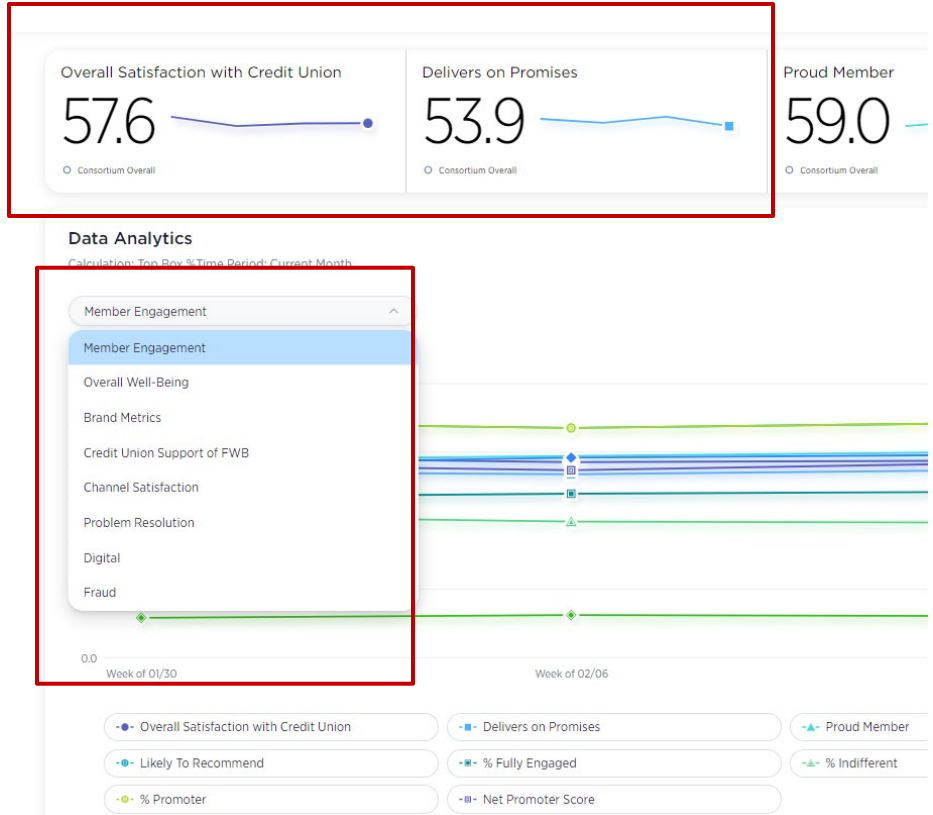
Satisfaction Graph reports display a line graph for question groups.



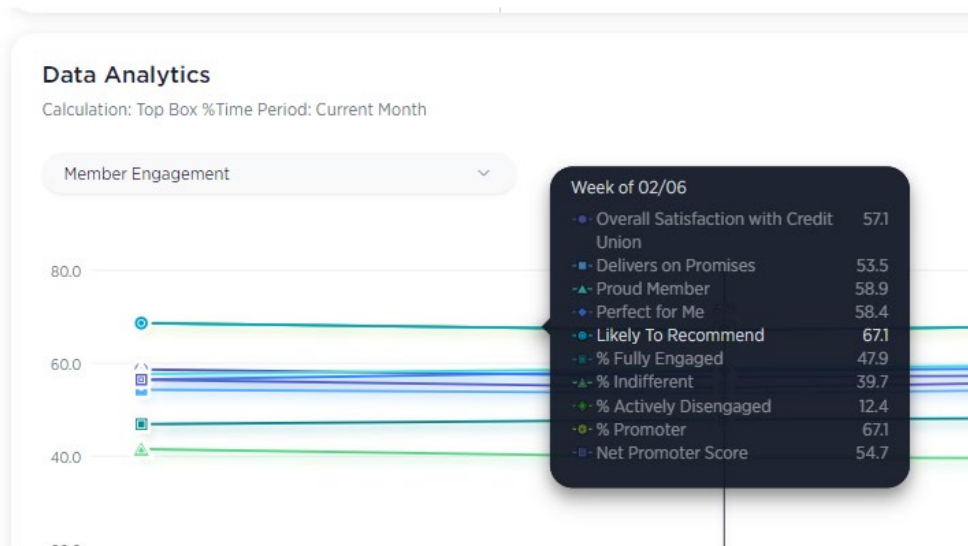
Users select a question group to display in the graph.

For example, the image below shows a line graph for a question group called Member Engagement.

Small charts above the line graph represent data for each question in the question group.

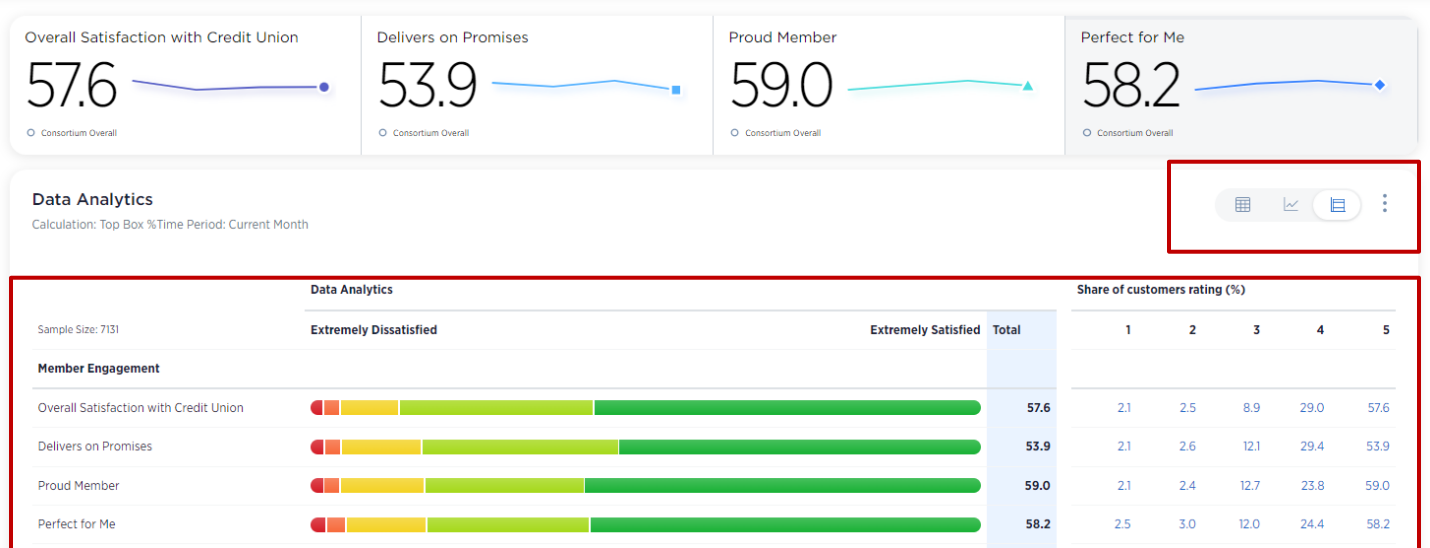


You can hover over the lines to view all data labels and values



Satisfaction Distribution Visualization Option

Satisfaction Distribution reports display the proportion of customers' scores for each question. To the left is a stacked bar chart to visually indicate the distribution % 1 (Extremely Dissatisfied), % 2, % 3, % 4, and % 5 (Extremely Satisfied) responses for each question. The **Total** column is a quick reference of the % 5 Strongly Agree responses. To the right are the actual percentages for the distribution.



Click a percentage in the 1-5 columns to open those survey responses on the Feedback tab, List subtab report.

Word Usage

Neutral: able, access, account, always, app, back, bank, better, branch, call, card, checking, credit, credit card, customer service, easy, experience, financial, friendly, go, good, great, help, how, know, loan, member, money, need, new, Nothing, online, Patelco, pay, payment, person, phone, problem, service, think, time, transfer, union, years

Negative: never

Records 1-25 of 7131

Statuses: All | Tags: All | [Mark As Read](#)

<input type="checkbox"/>	Respondedate	Credit Union	ME3 Mean Index Score	NPS Segment	Overall Satisfaction with Credit Union	CUSI	ME3 Engagement Level	Financial Wellbeing TSS3	Comments	Alert	Activity
<input type="checkbox"/>	☆ 02/26/2022, 01:19 PM	One Nevada Credit Union	3	Detractor	3	2	Actively Disengaged	Suffering	Let's see	-	-

Analytics | Member Profile

The Member Profile subtab displays results in the following categories:

- Member Gender (shown below)
- Member Age by Generation
- Member Tenure
- Problem Experienced

	Week of 01/ 30	Week of 02/ 06	Week of 02/ 13	Week of 02/ 20	Total Current Month	Benchmark Consortium Overall
Sample Size	1.1K	1.9K	2.3K	1.8K	7.1K	7.9K
	%	%	%	%	%	%
Member Gender						
Male	49.3	48.1	50.1	48.8	49.1	48.5 +0.6
Female	50.0	50.9	49.3	50.2	50.1	50.7 -0.6
Other	0.6	1.0	0.6	0.9	0.8	0.8 -

As denoted in the above Filters | Control Panel section, customize data displayed in this module using the Time Period, Unit, FWB Channel, Survey Program, Additional Filters, Columns, Benchmark, Profiler Calculation, and Comment Field filters.

Saved Filters: None
 Time Period: Current Month
 Columns: Time
 Benchmark: Cohort > Cohort 1
 Profiler Calculation: Percentages (%)

Time Period Filter: Current Month, Unit (+), FWB Channel (+), Survey Program (+), Additional Filters (+)

Columns Filter: Time, Benchmark, Cohort > Cohort 1, Profiler Calculation, Comment Field (+)

Analytics | Pivot Table

The Pivot Table subtab allows users to make ad hoc changes in the report itself to analyze data quickly.

Users should select a **Calculation**, **Question**, **Row** and **Column** to view results.

The screenshot shows the Gallup Pivot Table interface. At the top, there are navigation tabs: Scores, Member Profile, and Pivot Table. Below these are filters for Saved Filters (None), Time Period (Current Month), and Survey Program (Financial Wellbeing). The main area displays a table with the following configuration: Calculation: Top Box %, Question: Overall Satisfaction with Credit Union, Benchmark: Same Period Year Ago, Rows: ME3 Engagement Level, Columns: Gender. The table data is as follows:

	Grand Total	Male	Female
Grand Total	66.7	55.6	80.0
Fully Engaged	95.0	90.0	100.0
Indifferent	37.5	25.0	50.0
Actively Disengaged	0.0	0.0	0.0

Users have the option to also apply a **Benchmark** to their custom view.

The screenshot shows the Gallup Pivot Table interface with a different benchmark. The configuration is: Calculation: Top Box %, Question: Overall Satisfaction with Credit Union, Benchmark: Current Quarter, Rows: ME3 Engagement Level, Columns: Gender. The 'Remove Benchmark' checkbox is checked. The table data is as follows:

	Grand Total	Benchmark	Male	Female
Grand Total	66.7	66.7	55.6	80.0
Fully Engaged	95.0	95.0	90.0	100.0
Indifferent	37.5	37.5	25.0	50.0
Actively Disengaged	0.0	0.0	0.0	0.0

Users have the following **Calculation**, **Question**, **Rows** and **Columns** options. **Benchmark** options are currently limited to time periods only.

Calculation

Calculation

Top Box % ^

- ✓ Top Box %
- Average
- %

Question

Question

Overall Satisfaction with Credit Union ^

Key Metrics

- ✓ Overall Satisfaction with Credit Union
- Likely to Recommend

Financial Wellbeing

- Looks Out for my Financial Wellbeing
- Satisfied with Standard of Living
- Makes me Comfortable

Engagement

- Delivers on Promises

Question

Overall Satisfaction with Credit Union ^

- Proud Member
- Perfect for Me

Channel Satisfaction

- Branch Overall Satisfaction
- Online/Mobile Overall Satisfaction
- Contact Center Overall Satisfaction
- Lending Overall Satisfaction

Problem Metrics

- Problem Resolution Satisfaction

Fraud Metrics

Question

Overall Satisfaction with Credit Union ^

Channel Satisfaction

- Branch Overall Satisfaction
- Online/Mobile Overall Satisfaction
- Contact Center Overall Satisfaction
- Lending Overall Satisfaction

Problem Metrics

- Problem Resolution Satisfaction

Fraud Metrics

- Fraud Experience Overall Satisfaction

Rows

Rows Columns

) Remove Benchmark

Search

- Time Period
- Gender
- Member Tenure
- Problem Experienced
- ME3 Engagement Level
- Financial Wellbeing TSS3
- Member Age by Generation - From Survey

Columns

Columns

Remove Benchmark

Search

- Time Period
- Gender
- Member Tenure
- Problem Experienced
- ME3 Engagement Level
- Financial Wellbeing TSS3
- Member Age by Generation - From Survey

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