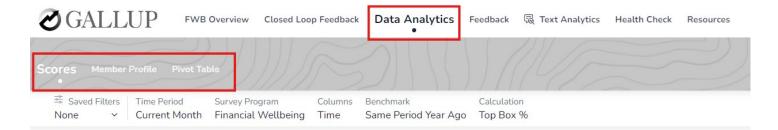
# GALLUP Medallia Reporting | Data Analytics

## **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.

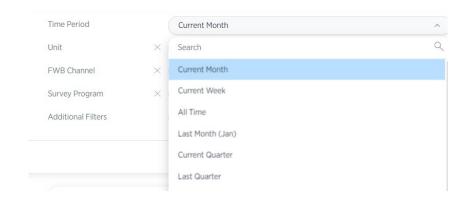


The left side of the control panel lists the **Time Period** and segment fields available for your role. The right side of the control panel includes **additional filters** that are available based on the various reporting tabs. Filters that appear will differ slightly between reporting tabs.

<b>Z</b> GALLU	P FWB Overview Closed Loop Feedbac	k Data Analytics Feedback	園 Text Analytics Health Check	Resources	Gallup Consultant
Scores Member Prof					
	me Period Survey Program Columns urrent Month Financial Wellbeing Time	Benchmark Calculation Same Period Year Ago			
Time Period	Current Month	~ ) +	Columns	Time	~
Unit	× +		Benchmark	Same Period Year Ago	~
FWB Channel	× (+)		Calculation	Top Box %	~
Survey Program	Financial Wellbeing +				
Additional Filters	+				
					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**



#### **FWB** Channel

FWB Channel ×	+	
Survey Program $ imes$	Search	Q
Additional Filters	Branch	
	Contact Center	
	Lending	
	Mobile/Online	
Overall Satisfaction wit	h General Member	

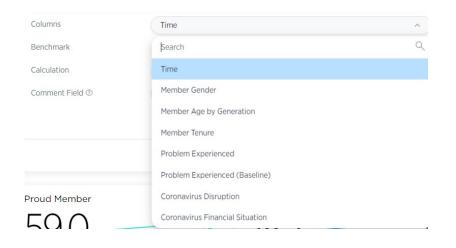
#### **Additional Filters**

Additional Filters	+	
	Search	Q
	Member Age by Generation	>
	Gender	>
Overall Satisfaction with	Member Tenure	>
57.6 —	Problem Experienced	>
	Problem Resolution	>
O Consortium Overall	Problem Resolution Satisfaction	>
Data Analytics	Problem Channel	>
Data Analytics Calculation: Top Box %Time Per	Lending Problem Channel	>
	Coronavirus Comment	>
	Record Has Comment	>

### Additional Filters (sub options example)

Additional Filters	+				
	Search	Q			
	< Problem Resolution				
	Yes				
Overall Satisfaction with	No				

#### Columns



#### Benchmark

Benchmark	Consortium Overall	^
Calculation	Search	٩
Comment Field ⑦	Consortium Overall	
	Cohort	>
	Past Performance	>

#### 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.

Calculation	Top Box %	^
Comment Field <sup>®</sup>	Search	Q
	Top Box %	
	Fully Engaged Top Box %	
	Average	

## **Comment Field**

Comment Field <sup>®</sup>	+	+				
	Search	Q				
	Select a Comment Field					
	All Comment Fields					
	Improve Call Experience					
Proud Member	Primary Provider Comment					
590-	Ease of Doing Business Follow-Up					
55.0	Branch: Improve Teller Experience					
O Consortium Overall	Loan Reason: Other (Comment)					
	Future Wellbeing Support Comment					
	CC: Financial Goals Reason					
	Lending: Financial Goals Reason					
	Problem Description					
WFFK OF 02/13	Wh. Imnsova Lending					

## 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.

GALLUP FWB Overview	Closed Loop Feedback Feedback	• Data Analytics Text	Analytics Health Check	Resources		⊥ □	FWB MX -     Judy Fra
	enchmark Calculation					M	
ne ~ Current Month Time C	onsortium Overall Top Box %						
57.6	• 53.9	5	Proud Member	<b>A</b>	Perfect for	2	•
Consortium Overall	O Consortium Overall		O Consortium Overall		O Consortium Over	all	
Data Analytics Calculation: Top Box %Time Period: Current Month							
Calculation: Top Box %Time Period: Current Month	CURRENT MONTH					NSORTIUM OVERALL	
Calculation: Top Box %Time Period: Current Month 	WEEK OF 01/30	WEEK OF 02/06	WEEK OF 02/13	WEEK OF 02/20	TOTAL	NSORTIUM OVERALL BENCHMARK	DELTA
Calculation: Top Box %Time Period: Current Month G Sample Size: • Iess than 75		WEEK OF 02/06 1,857	WEEK OF 02/13 2,342	WEEK OF 02/20 1,792		NSORTIUM OVERALL	
Calculation: Top Box %Time Period: Current Month 	WEEK OF 01/30				TOTAL	NSORTIUM OVERALL BENCHMARK	DELTA
Calculation: Top Box %Time Period: Current Month	WEEK OF 01/30	1,857	2,342	1,792	TOTAL 7,129	NSORTIUM OVERALL BENCHMARK 7,129	<b>DELTA</b> 0
Calculation: Top Box %Time Period: Current Month  Sample Size: • = less than 75  Member Engagement  Overall Satisfaction with Credit Union	WEEK OF 01/30 1138 58.6 0	1,857 57.1 o	2,342 57.5 o	1,792 57.6 O	TOTAL 7,129 57.6	NSORTIUM OVERALL BENCHMARK 7,129 57,6	<b>DELTA</b> 0 0.0
Calculation: Top Box %Time Period: Current Month Sample Size: • = less than 75 Member Engagement Overall Satisfaction with Credit Union Delivers on Promises	WEEK OF 01/30 1138 58.6 0 54.3 0	1,857 57.1 o 53.5 o	2,342 57.5 o 54.8 o	1,792 57.6 o 52.8 o	TOTAL 7,129 57.6 53.9	NSORTIUM OVERALL BENCHMARK 7/129 57.6 53.9	DELTA 0 0.0

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	Time	~
Benchmark	Consortium Overall	~
Calculation	Top Box %	~
Comment Field ⑦	+	
	J	

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 Mor	nth						
	CURRENT MONTH					CONSORTIUM OVERALL	
	WEEK OF 01/30	WEEK OF 02/06	WEEK OF 02/13	WEEK OF 02/20	TOTAL	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							
% Yes Fraud Experience	13.3 0	12.7 0	12.3 0	10.9 0	12.2	12.2	0.0
Fraud Experience Overall Satisfaction	67.6 0	64.9 0	71.4 0	64.6 O	67.4	67.4	0.0
Fraud Handling: Advice and Guidance	56.2 0	48.0 0	58.0 O	62.9 0	57.2	57.2	0.0
Fraud Handling: Updates on Claim	56.2 0	37.5 0	56.7 O	62.9 0	54.9	54.9	0.0
Fraud Handling: Empathized	62.5 0	50.0 0	58.0 0	68.6 O	59.7	59.7	0.0
Fraud Handling: Feel Safe	68.8	48.0 0	63.8 0	68.6 O	62.8	62.8	0.0
Fraud Handling: Easy Process	68.8	48.0 0	67.1 0	68.6 O	64.4	64.4	0.0
Fraud Handling: Helped Research and Resolve	56.2 0	48.0 ¥	68.6 0	74.3 0	65.1	65.1	0.0
SIGNIFICANCE TESTING	↑ Positive ✓ Negative	Significance Le	evel:	5%	Min. Sample Size:		1
SIGNIFICANCE LESTING	<ul> <li>Negative</li> <li>Not Significant</li> </ul>	Comparison:		Adjacent column (left)	Min. Absolute Difference	e:	0

## Satisfaction Graph Visualization Option

Satisfaction Graph reports display a line graph for question groups.

Overall Satisfaction with Credit Union 57.6	Delivers on Promises 53.9	Proud Member 59.0	Perfect for Me 58.2
Data Analytics Calculation: Top Box %Time Period: Current Month Member Engagement			
80.0		9	0
60.0 B			
40.0	<u></u>	4	<u>A</u>
20.0 	•	÷	•
0.0 Week of 01/30	Week of 02/06	Week of 02/13	Week of 02/20
Overall Satisfaction with Credit Union	Delivers on Promises	- Proud Member	••• Perfect for Me
-®- Likely To Recommend	% Fully Engaged	-=- % Indifferent	••• % Actively Disengaged
-•- % Promoter	Net Promoter Score		

			٦
	Overall Satisfaction with Credit Union	Delivers on Promises	Proud Member 59.0 —
Users select a question group to display in the graph.	O Consortium Overall Data Analytics	O Consortium Overall	O Consortium Overall
For example, the image below shows a line graph for a question group called Member Engagement.	Calculation: Top Box % Time Deriod: Current Month Member Engagement Member Engagement Overall Well-Being Brand Metrics		
Small charts above the line graph represent data for each question in the question group.	Credit Union Support of FWB Channel Satisfaction Problem Resolution Digital Fraud		
	0.0	Week of 02/06	
	Overall Satisfaction with Credit Union	Delivers on Promises	-A- Proud Member
	-@- Likely To Recommend	-#- % Fully Engaged	-å- % Indifferent
	-0- % Promoter	-B- Net Promoter Score	

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

arculati	on: Top Box %Time Period: Current N	Month		
Memo	ber Engagement	~	Week of 02/06	
			<ul> <li>Overall Satisfaction with Credit Union</li> </ul>	t 57.1
80.0			Delivers on Promises	53.5
			Proud Member	58.9
	0		Perfect for Me	58.4
	•		<ul> <li>Likely To Recommend</li> </ul>	67.1
60.0	13		% Fully Engaged	47.9
			-A- % Indifferent	39.7
			·*· % Actively Disengaged	12.4
			-®- % Promoter	67.1
40.0	A		- Net Promoter Score	54.7

#### 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.

Overall Satisfaction with Credit Unic 57.6	nc ——•	Delivers on Promises 53.9 • consortum Overall	Proud Member 59.0 ° consortum Overali	<b>A</b>	Perfect for 58.	2 -			-•
Data Analytics Calculation: Top Box %Time Period: Current Mo	onth								
	Data Ana	lytics			Share of custo	omers ratin	g (%)		
Sample Size: 7131		lytics ly Dissatisfied	Extremely Satisfied	Total	Share of custo	omers ratin 2	g (%) 3	4	5
Sample Size: 7131 Member Engagement			Extremely Satisfied	Total				4	5
-			Extremely Satisfied	Total 57.6				<b>4</b> 29.0	<b>5</b> 57.6
Member Engagement			Extremely Satisfied		1	2	3		
Member Engagement Overall Satisfaction with Credit Union			Extremely Satisfied	57.6	1 2.1	<b>2</b> 2.5	<b>3</b> 8.9	29.0	57.6

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

UALL	LUP	FWB Overview	Closed L	oop Feedback	Feedback	Data Analytics	Text Analytics	Health Check	Resources					⊥ [		FWB MX - 9 Judy Fran
Detail	2)		SF	5)			(N)	T	2	$\geq$	IJ,		)J	Y	$\mathcal{D}$	
Saved Filters	Time Period Current M			with Credit Uni.												
Word Usa	age															
Neutral	able ac	acco	unt	always app	<sub>back</sub> ban	nk <sub>better</sub> br	ranch call	card checkin	g credit	credit card c	ustomer service	easy	experience	financial	friendly	
			help	how know	loan m	nember money	need ne	ew Nothing	online	Patelco pay	payment	person	phone	problem	service	
	think	time trans	sfer unior	n years												
Negative	never															
															Collaps	e ^
Records 1-25 of	7,131													Show	w full com	ments
		Tags														
Statuses	~			×											Mark As	
All	v		n	ME3 Mean Index Score	NPS Segment	Overall Satisfac		ME3 Engagement			omments			Ale		Read

## 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

GALLUP F	WB Overview Close	d Loop Feedback	Feedback D	eata Analytics Text	t Analytics Health C	heck Resources			$\checkmark$		FWB MX - Sup Judy Frankli
Member Profile											
Saved Filters Time Period	Columns Benchm n Time Consor		Profiler Calculation Percentages (%)								T\$1
				Week of 01/30	Week of 02/ 06	Week of 02/ 13	Week of 02/20	Total Current Month		hmark um 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	
				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.

me Period	Current Month	V + // Columns	Time	~
			- Contraction -	
iit	× (+)	Benchmark	Cohort > Cohort 1	~
WB Channel	$\times$ (+)	Profiler Calculation	Percentages (%)	~
rvey Program	× (+)	Comment Field ③	+	

## 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.

Member Profile Pivot Table						
Saved Filters Time Period Survey Pro	<sup>ogram</sup> I Wellbeing					
Time Period: Current Month   Benchmark: Same Calculation Q	e Period Year Ago 🔨 Question	Benchmark	Rows	Columns		
(Top Box % ~ )	Overall Satisfaction with Credit Union 🔗		<ul> <li>ME3 Engagement Level × +</li> </ul>		Apply Benchma	rk
	Overall Satisfaction with Credit Union		Male	Female	Apply Benchma	
Grand Total		66.7	Male • E	Female	Apply Benchma	<b>Q</b> 80.
		66.7 © 95.0	Mate © 5	Female	Apply Benchma	● 80. ● 100.
Grand Total Fully Engaged		66.7	Mate • 5	Female	Apply Benchma	

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

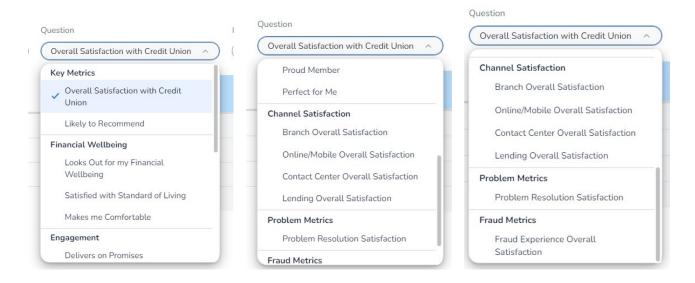
GALLUP FWB Overview CLo	osed Loop Feedback Data Analytics Feedback	環 Text Analytics Health Check Resourc	es	Q □ ③ Gallup Co Katherir
Member Profile Pivot Table		M		5/11/1/
Saved Filters         Time Period         Survey Program           one         ~         Current Month         Financial Well				
Time Period: Current Month   Benchmark: Current Qu	arter			:
Calculation Questic		Rows	Columns	
	rall Satisfaction with Credit Union V			+ Remove Benchmark
	Grand Total	Benchmark	Male	Female
	66.7	66.7		
Grand Total	00.7	66.7	♀ 55.6	● 80.0
Grand Total Fully Engaged	• 95.0		© 55.6 © 90.0	
		● 95.0		● 100.0
Fully Engaged	<b>9</b> 5.0	© 95.0 © 37.5	● 90.0	
Fully Engaged	• 95.0 • 37.5 • 0.0	© 95.0 © 37.5	• 90.0 • 25.0	• 100.0 • 50.0

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

#### Calculation

Top Box %	~
✓ Top Box %	
Average	
%	

#### Question

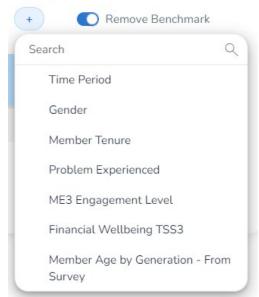


#### Rows

Search	Q
Time Period	
Gender	
Member Tenure	2
Problem Experi	enced
ME3 Engageme	ent Level
Financial Wellb	eing TSS3
Member Age by Survey	y Generation - From

#### Columns

#### Columns



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