Quick Reference Guide
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Welcome, John! Examine your Customer survey trends below. For interactive analysis, use the Quick Links at the bottom of the page or use the Navigation Bar above.

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<td>Prioritize operational strengths and weakness areas by importance</td>
<td>See your results in rank order and compare against benchmarks</td>
<td>Access training guides, FAQs, feedback forms, and other documents</td>
<td>View individual invitation details and assess response rates</td>
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User Groups/Roles

Terminology:

• A **User Group** or **Role** represents a group of users with access to similar capabilities and data
  • Drives access and data scope setting in the application, i.e. what reports can be accessed, what data can be seen and which alerts are received.

User Group Examples

• Sales Manager
• Service Manager
• General Manager
• Corporate
# Center Management Reports

The below table provides instructions on where to find reports in the new Medallia tool.

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<th>Medallia Reporting</th>
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<td>Invitations &gt; Filter view</td>
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<td>10 CSI Performance by Employee</td>
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<td>Use Filters across the top of each page to drill down across tabs</td>
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<td>16 BMW Eligibility Report</td>
<td>Invitations &gt; AVP Eligibility view</td>
</tr>
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</table>
# Using Filters

## Survey Drill Down (Employee Report)

This dropdown allows segmentation of reports by a range of available data such as Timeperiod, Survey Channel and Brand.

The Segment menu allows selection of multiple parameters at the same time.

This example shows how you can filter by Premium Survey = Yes and Invitation status = Completed

The filter values you set will carry forward as you move through the application to other reports.

<table>
<thead>
<tr>
<th>Segment</th>
<th>Selection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Timeperiod</td>
<td>Current Year (2015)</td>
</tr>
<tr>
<td>Survey Channel</td>
<td>All</td>
</tr>
<tr>
<td>Brand</td>
<td>All</td>
</tr>
<tr>
<td>Survey Length</td>
<td>All</td>
</tr>
<tr>
<td>Region</td>
<td>All</td>
</tr>
<tr>
<td>Market</td>
<td>All</td>
</tr>
<tr>
<td>Ownership Group</td>
<td>All</td>
</tr>
<tr>
<td>Dealer</td>
<td>All</td>
</tr>
<tr>
<td>Center ID</td>
<td>All</td>
</tr>
<tr>
<td>Location ID</td>
<td>All</td>
</tr>
<tr>
<td>Advisor</td>
<td>All</td>
</tr>
<tr>
<td><strong>Segments</strong></td>
<td></td>
</tr>
</tbody>
</table>

- **Search:**
  - Premium Survey
  - BMW Followup Corporate Office
  - BMW Followup Dealer
  - Technician
  - Invitation status
  - OSAT Segment

- **Filter Values:**
  - **Premium Survey:** Yes
  - **Invitation status:** Completed
Using Filters

Benchmarks & Questions

**Benchmark Filter:**
Compare scores with the scores of another area of the hierarchy or previous time period.

This filter is available for Satisfaction & Ranking reports.

**Questions Filter:**
Use the Questions filter to display results for individual questions on the Satisfaction and Profiler Graphs or to rank by scores for individual questions in Ranking.
Dashboards

Dashboard tab

Dashboards are configured with limited data scope. A Sales Manager will only see results for Sales survey at their dealership, General Managers will see all results for their dealer. Corporate level users (individuals with a QT#) have access to all data.

Click show filters to adjust the timeperiod, calculation, or segments.
Dashboards Cont’d

Key Metric Trends (Premium Report)

Key metrics are displayed on these dials, and the score is shown underneath the dials.

View Details link leads to additional calculations.
Dashboards Cont’d

Recent Responses (Managers and Advisor View)

Clicking on a response takes you to the Responses Tab.

Hovering over a response shows the comments for that response.
Responses

Filter View

The responses report gives access to survey responses in real time.

Sub-tabs for alternate data views

Expanding the filter view displays additional response detail in the Responses Filter list

Use the sort triangles wherever they appear in the application to sort data

Additional filter options for this report include score, alert, and text search (for more info on filters see Using Filters section)

Clicking on a response will lead to the Responses Form view with the survey details (see next page)
Responses Cont’d

Form View

This view displays individual survey response details and scores – both premium and diagnostic questions. (Captured Contact Information, OSAT Comment Reject Reason Summary Reports)

Clicking on a survey from the Responses Filter view will lead to form view. Alternatively, click on Form from the responses page to switch to Form view.

Scroll through surveys.

Customer and Vehicle information.

Note that survey questions not answered by the customer will not be displayed.
Responses Cont’d
Form View (Escalating a Customer OSAT Comment)

Use the dropdown box to choose a reason for escalating a customer OSAT comment.

Type in a reason for escalating the OSAT comment to help with.

Once done, click “Update Contact Report” to submit the escalation for review.
Satisfaction

Table

This report shows all the rated questions and their scores based on the filters selected.

Navigate using these tabs

Sample size is displayed here. Red numbers = less than 5 responses

The Benchmark selector allows you to compare scores with the scores of other area, region and national level Site, Channel, or previous time period

Score difference
Satisfaction Cont’d

Graph

This report provides satisfaction results in a time series graph.

Select a question or question group in the Question filter dropdown menu.

Clicking on an item in the legend will hide that item from the graph.

Hovering over a data point will display details.

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Satisfaction Cont’d

Distribution

Displays score ranges graphically

Color coding visually indicates the range of responses from high scores (green) to neutral scores (yellow) to low scores (red)
Satisfaction Cont’d

Compare

Comparison of scores versus a benchmark

Select a benchmark from the dropdown

Green and red bars show better or worse performance than benchmark
Satisfaction Cont’d
Sales and Service Management Report
Shows the score for all the questions at one place

Note that this report is not available for all roles
Satisfaction Cont’d

AVP Eligibility (BMW Only)
Shows the email capture rates, resolution rates, and premium scores. (BMW Eligibility Report)
Profiler

Table

Shows customer segmentation data in tabular and graphical form

Note that this report is not available for all roles
Action Planner

Action Plot

View the strengths and weaknesses of the attributes. Note that this report may not be available for all roles.

Use the filters to set time, segments, and outcome variable. Be sure to select enough sample to yield results.

Adjust the graph axis to zoom in and out of different attributes.

Hover over attributes to identify key data points regarding the analysis.

Click to activate dropdown to select other axis attributes.

Click to select/unselect various parameters.
Ranking

Shows ranking of hierarchy data and other key survey segmentations (Premium Report by Employee, CSI Performance by Employee, Overall Experience by Employee, Overall Satisfaction Rating Reports)

Select the area to rank by from the options below the navigation bar

Use the filters to set question(s), benchmarks, or calculations

Dynamically sort the table by selecting the arrow at the top of the table
Documents

Download training guides and other materials

[Frequency Asked Questions]
- How do I resend a survey?
- Where are my June survey scores?
- Why is my Email Capture/issue Resolution rate incorrect?
- Why are my Advisors/Technicians not showing up?
- How do alerts work in Medallia?
- How are Mulligans (BMW only) and Appeals applied in Medallia?
- What happened to my June Mulligans? (BMW only)
- How are the premium scores calculated in Medallia?
- Why am I or is my colleague, having difficulties logging in to Medallia?

[Medallia User Guides]
- Medallia Reporting Application
  - Quick Reference Guide | Download PDF
- Medallia Reporting Application
  - User Guide | Download PDF
- Social and Mobile Reporting Application
  - User Guide | Download PDF

[Sample Email Invitations]
- BMW Passenger Cars
  - NVG Email Invitation | Download PDF
  - Thank You Email | Download PDF

Select the documents tab to view the materials
Click the view or download tab to select the material
Invitations

Filter
Shows status of individual survey invitations (Email Capture Transparency Report, Customer Survey Invitation Status Report)

Use the hierarchy to narrow selection of invitations

Run a custom query

View individual invitation status or click the record to view additional
Invitations Cont’d

Record
Shows invitation details

View invitation details
Invitations Cont’d

Invitation Stats
Shows the number of Records Processed, Invitations sent, invitation bounce rate, etc. (Email Tracking Report, Survey Summary Trend Report)
Call Center

Call Center Role

This function is designed to help you identify and resolve customer records with:

- E-mail address was not captured or provided at the time of the vehicle purchase or vehicle service event
- Survey invitation E-mail was returned as ‘Bounced’ due to an undeliverable E-mail address

Please Note: the send feature within the Call Center is only available for 35 days for Service and 33 Days for Sales from the Medallia Received Date. After a survey is sent from the Call Center, the disposition of the record changes to “Invitation Resent”.AC
Call Center

Missing/Fixing Customer Email Address

Follow the below steps to update a customer’s email address in the Medallia tool.

1. Click on the Invitations record that you would like to update and click on the “Edit Case” box.
2. Fix/Update the customer’s email address/
3. Click on the “Update Contact Request” button to update the invitation record.

Please Note: This will save the corrected customer’s email address but will not automatically resend the survey invitation. Please see “Resending Survey Invitations” for instructions on resending surveys to customers.
Call Center

Resending Survey Invitation

Follow the below steps to update a customer’s email address in the Medallia tool.

1. While in the invitation record, use the drop down box and select “Resend Invitation”.
2. If the customer’s correct email address does not populate enter it in the “Email” box.
3. Click “Resend Invitation” to send the survey invitation to the email address that is shown.

Please Note: Editing the Email and resending the invitation **will not** update the Invitation Record. Please see the “Missing/Fixing Customer Email Address” slide on instructions to update customer email addresses.
Using Bookmarks

Save your favorite or commonly used reports

Step 1: Run the report with the selected filters you’d like to save
Step 2: Select the Bookmark icon
Step 3: Name your report in the highlighted area
Step 4: Save your bookmark by clicking Save. Your bookmark will then be added to the list.
Exporting Reports

Reports can be printed or exported in PDF or Excel format

1. Run the report you’d like to export data from
2. Select the Export button

The export will contain all data visible on the screen

Export functionality is available for Responses, Satisfaction, Profiler, and Ranker tabs, as well as individual modules on Dashboards.

Note: Graphs will only have “Print” and “PDF” export options.