

Chapter 1:

Executive Summary and HEAT MAP

Just as the name suggests, the Executive Summary page displays a summary of the latest survey figures as they apply to the stores for which you are responsible. The summary includes the response rate (the overall percentage of customers responding to the survey questions when asked), the overall satisfaction score, and the scores for each of the survey question categories. When you first enter the Executive Summary page, it also displays the HEAT MAP, which gives you a clear visual indication of which survey categories require the most immediate attention.

What you need to know about the Executive Summary page:

- It gives you the latest survey statistics for your stores.
- It gives you links to each customer's answer to each question, which lets you go straight to customer records and alert information.
- This is a quick way to zero in on problems.
- It provides access to HEAT MAP reporting, ranking the survey results for your customers, stores, districts and regions (depending on the management level of your account).

Ask Listen Retain 'VOICE OF THE CUSTOMER'

ALR_NATIONAL

ABC
Response Rate: 78 %

Executive Summary	84%	-
	Current	Show Previous
Staff's Performance	80 %	-
The Facility	88 %	-
Our Products	88 %	-
Loyalty	79 %	-

ABC Co. - December 2011

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HEAT MAP ASK LISTEN RETAIN

Satisfaction Distribution : Extremely Satisfied ----- Dissatisfied
Legend : Yellow > 79% | Orange 70% to 79% | Red < 70%

Category	Satisfaction Score
Staff's Performance	80 %
The Facility	88 %
Our Products	88 %
Loyalty	79 %
Overall	78 %

The Executive Summary Page and the HEAT MAP Tab

Note: The percentages and scores shown on the Executive Summary page (as well as the other pages in the ALR system) are for the stores which have been assigned to you in ALR by the system's administrators. These will typically be the stores which are your responsibility within your company.

So if you are a Store Manager, you will see the scores and survey information for your store. If you are a district or regional manager, you will usually be assigned the stores in your region or district. Higher-level executives may see the data for all stores in the system.

But as a general rule, if you see it, then at some point in your company's organizational structure, it's your responsibility.

The Executive Summary Score

The bar labeled Executive Summary (in the upper right-hand part of the page) gives you the overall customer-satisfaction score for your store(s). It is the average (mean) of the overall survey scores for each of your customers who was surveyed for the current survey as well as the previous survey for comparison purposes.



The Executive Summary Score

The scores themselves are calculated from the answers given to the survey questions. They represent degrees of satisfaction, given as percentages, with 100% representing complete satisfaction, and lower percentages indicating proportionately less satisfaction.

This means that if Customer # 1 gave your store an overall rating of 83%, customer # 2 gave it a total score of 75%, and Customer # 3 gave it a score of 63%, the overall score for your store would be $(83 + 75 + 63)/3 = 73.667\%$, rounded up to 74%.

That's the number that will appear in your Executive Summary bar.

Survey Results Page

Clicking on that number brings up the Survey Results page, with raw survey data for your store. It includes a list of all of the survey questions (numbered for identification). Below the survey questions is a list of all of the customers from your store(s) who responded to the survey, along with their survey answers (keyed to the question ID numbers) and contact information.

Survey Questions

- 1 When was the last time you were visited by your field rep?
- 2 How would you rate your field rep's communication consistency with you?
- 3 How would you rate your field rep's ability to provide education on the product categories sold?
- 4 How would you rate your sale rep's care and concern for your business?
- 5 How would you rate the information and data support available to you?
- 6 How would you rate the level of technical support available to you?
- 7 How would you rate the marketing and promotional tools available to you?
- 8 How would you rate the consistency of lead times on deliveries?
- 9 How would you rate the fill rates provided to you?
- 10 How would you rate the overall QUALITY of the product as compared to the competition?
- 11 How would you rate the overall WARRANTY's offered as compared to the competition?
- 12 How would you rate the FILL RATES and TURNAROUND times as compared to the competition?
- 13 How would you rate the OVERALL VALUE (ie. service offerings) of product as compared to competition?
- 14 What % of your parts purchases are made from the competition?
- 15 Do you feel like you are treated as a valued customer?
- 16 Would you recommend us as a parts supplier?
- 17 Are there any unresolved concerns/issues from our last satisfaction survey?

Scroll horizontally to see full grid

Excel®

Region	District	Store#	-	Name	Customer	Phone	Email	Date	1	2	3	4	5	6
East	District 1	0137	1715	DALZIELS AUTO BODY	JOHN	9023683899	peter@compechek.com	7/3/2011	Last Month	7	7	5	7	7
East	District 1	0137	2505	FRIZZELS AUTO BODY	ANDREW	9023682892	peter@compechek.com	7/3/2011	Last Month	10	10	10	7	10
East	District 2	0369	1245	BRUNTS AUTOMOTIVE	JENNIFER	9024315158		7/3/2011	Last Week	7	10	7	7	10

The Survey Results Page

Just above the customer list, on the left-hand side of the page, is a button labeled Excel®. You can click on it to export the raw customer survey data to a Microsoft Excel file; it will include all of the information which you see in the customer survey raw answer list. The exported data is available for use in customized reports, or in your company's in-house reporting system.

When you click a name in the customer list, you will get to the Individual Survey Results page for that customer, which is the nerve center for customer response. The Individual Survey Results page is covered in depth in Chapter 5 of this manual.

Category Scores

Below the Executive Summary bar, you will see the customer-satisfaction scores for each major category of questions in the survey. Like the overall score, these scores represent the average for each customer surveyed for your store(s). The category scores are colour-coded for quick identification: gold highlighting is good (a score of 80% or more), silver (un-highlighted) shows less satisfaction (70% to 79%), and bronze (red highlighting) indicates serious problems (69% or lower).

Executive Summary		79%	65%
		Current	Previous
Salesrep Performance:	▲	92 %	77 %
Managers Performance:	▲	91 %	82 %
Services:	▲	69 %	61 %
Loyalty:	▲	62 %	39 %

Category Scores

Next to the category names, you will now see up- or down-arrows, indicating whether your store(s) have improved or fallen behind in customer satisfaction since the last survey.

And like the overall score, when you click on the name of a survey-question category, you will see the Survey Results page for that category, with numbered questions, raw survey data for each customer who responded, and links to their Individual Survey Results pages.

Note: If you see an X highlighted in red where a customer's raw survey data should be (as in the third example in the screenshot below), it means that the customer could not be reached (even after repeated attempts), or refused to participate in the survey, or did not reply.

Survey Questions										
1 When was the last time you were visited by your field rep? 2 How would you rate your field rep's communication consistency with you? 3 How would you rate your field rep's ability to provide education on the product categories sold? 4 How would you rate your sale rep's care and concern for your business?										
Region	District	Store #	-	Name	Customer	Phone	1	2	3	4
East	District 1	0137	1715	DALZIELS AUTO BODY	JOHN	9023683899	Last Month	7	7	5
East	District 1	0137	2505	FRIZZELS AUTO BODY	ANDREW	9023682892	Last Month	10	10	10
East	District 2	0369	1245	BRUNTS AUTOMOTIVE	JENNIFER	9024315158	Last Week	7	10	7
Mid	District 2	0410	1904	CITY BANK COLLISION	RON	9024686556	X			
Mid	District 3	0440		LORDCO AUTO - VEDDER		6048582200	Last Month	10	10	10
Mid	District 3	0440		LORDCO AUTO - YALE		6047921999	X			
East	District 4	0511	3377	BAY ROAD TIRE	DANNY	9028765586	Last Month	7	7	7

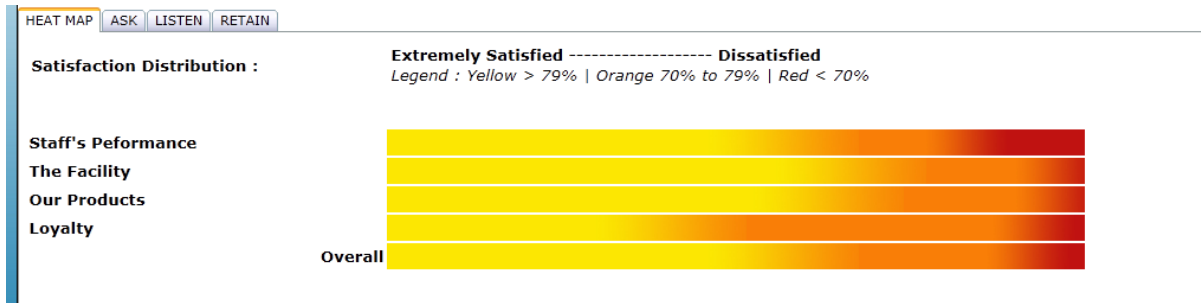
Category Survey Results

The HEAT MAP

Below the Executive Summary section, you will see four tabs: "HEAT MAP," "ASK," "LISTEN," and "RETAIN." The last three are covered in the following chapters. The HEAT MAP tab is described here, since it is so closely related to the Executive Summary itself.

The HEAT MAP uses colour-shaded "heat bars" to show the overall range of customer satisfaction/dissatisfaction for each survey-question category, as well as the overall survey. The colour-shading on the heat bars is like the colour-coded highlighting of the Executive Summary scores, except that the middle range is represented by orange, rather than white.

This allows the HEAT MAP to show satisfaction/dissatisfaction as a smooth gradation, from good (high levels of customer satisfaction) on the left, through orange (less satisfaction) in the middle, to red (serious dissatisfaction) on the right. The amount of the bar devoted to each colour indicates the number of customers expressing that level of satisfaction or dissatisfaction.



Heat Map

A bar that's mostly gold means that you have a lot of satisfied customers, and not many who are dissatisfied. A bar that's mostly red means that most of your customers are dissatisfied. A bar that's mostly orange, with only a bit of gold and a bit of red at either end means that while they aren't seriously dissatisfied, there is significantly more that you could do to make them happy.

Summary Reports

When you click on a bar, you'll see the Summary Report for that survey-question category. The Summary Report lists each customer's overall satisfaction score for that category, sorted by rank and colour-coded using the same system as the Executive Summary scores: gold (80% or above), silver (70% to 79%), and bronze (below 70%).

RESULTS - Summary by

Name	Customer	Phone	Overall	Staff's Performance	The Facility	Our Products	Loyalty
Class 1: Gold Level Status (Above 79%)							
3809	QC AUTOMOTIVE	9024547117	87 %	93 %	88 %	85 %	80 %
4420	K&B AUTO WORKS	9024454426	87 %	73 %	94 %	78 %	100 %
5225	RCMP TIRE SERVICE	9024791556	81 %	80 %	88 %	85 %	68 %
Class 2: Silver Level Status (70% - 79%)							
3377	BAV ROAD TIRE	9028765586	77 %	65 %	76 %	85 %	80 %
Class 3: Bronze Level Status (Below 70%)							
123	PETER'S AUTO	5065463284	62 %	73 %	66 %	68 %	40 %

Overall Summary Report

Clicking on the Overall bar on the HEAT MAP (at the bottom), brings up the Summary Report for the survey, with each customer's score for each category and for the overall survey, all colour-coded, and ranked according to their overall scores.

Higher-Level Management

If you have been assigned a higher-level management role (such as National or Regional Manager) in the ALR system, the information that you see on the Executive Summary page and in the HEAT MAP tab (and in the raw scores on the Survey Results pages) will be very similar to that seen by a Store Manager, but it will cover all of the stores, regions, or districts which you are responsible for.

Summary Reports

The most significant differences are in the Summary Reports. A Store Manager will see the basic set of Summary Reports, as described above. This is true even if the Store Manager has been assigned

more than one store; the reports will simply list customers for all stores assigned to that Store Manager, without separating them out by store. Higher-level managers, however, will see more than one level of Summary Reports.

Store	Region	Staff's Performance
Class 1: Gold Level Status (Above 79%)		
Guildford	East	92 %
Class 2: Silver Level Status (70% - 79%)		
East van	East	77 %

District Manager's Summary Report

A regional or district manager who had been assigned a set of stores in a district, for example, would see a District Summary Report showing the category or overall customer-satisfaction scores for each store in the district, ranked and colour-coded (Gold/Silver/Bronze).

Viewing the Store Manager's Executive Summary

When you click on a store's name in the District Summary Report, the Executive Summary page of the Store Manager responsible for that store will open in another browser window.

Executive Summary		94%	-
	Current		Show Previous
Staff's Performance	92 %		-
The Facility	94 %		-
Our Products	98 %		-
Loyalty	93 %		-

Satisfaction Distribution :

Extremely Satisfied ----- Dissatisfied
 Legend : Yellow > 79% | Orange 70% to 79% | Red < 70%

Staff's Performance

- The Facility
- Our Products
- Loyalty
- Overall

District Manager's View of the Store Manager's Executive Summary Page

As long as you are in that browser window, you will see what that Store Manager sees on the ALR system. To view a store-level Summary Report, click on the appropriate HEAT MAP bar in the Store Manager's Executive Summary window.

WELCOME | DIST4_MGR
GO TO EXECUTIVESUMMARY

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Excel

RESULTS - Summary by

Name	Customer	Phone	Staff's Performance
Class 1: Gold Level Status (Above 79%)			
3160 ULTRA AUTO	YVON	5065484294	100 %
5150 CURT'S AUTO	CURTIS	5065457978	88 %
4321 FRANKS MUFFLER	BLAKE	9024547496	88 %

The District Manager's View of the Store-Level Summary Report

District Recap

A higher-level manager who has been assigned a region (including stores in more than one district) will see a Summary Report page which includes a District Recap giving the customer-satisfaction scores for each district represented in the region, and a Regional Summary showing the score for each store in the region. (Note that if a region includes only some, but not all, stores in a district, the scores in the District Recap will be based only on those stores, rather than on all of the stores in the district.)

Recap - District

District	Staff's Performance
Class 1: Gold Level Status (Above 79%)	
1 District 2	85 %
2 District 4	82 %
Class 2: Silver Level Status (70% - 79%)	
3 District 1	74 %

Click here to bring up the district-level Executive Summary Page in another browser window.

Excel

East- Regional Summary Results

Store	District	Staff's Performance
Class 1: Gold Level Status (Above 79%)		
Guildford	District 4	92 %
Langley	District 2	85 %
Class 2: Silver Level Status (70% - 79%)		
East Van	District 4	77 %
Delta	District 1	74 %

Regional Manager's Summary Report With District Recap

Clicking on a district link in the District Recap will open a new browser window with an Executive Summary page for that district, very much like the Store Manager's Executive Summary page in the preceding example. The Summary Report links from the HEAT MAP in the District page will show only the stores included in the region. Other links, however (such as raw survey scores), will include all of the stores in the district.

DISTRICT 1

Response Rate:
100%

Executive Summary		
	70%	-
	Current	Show Previous
Staff's Performance	56 %	-
The Facility	76 %	-
Our Products	81 %	-
Loyalty	68 %	-

You're viewing the district-level Executive Summary page.

DISTRICT 1 [Coopers - June 2012]

Français

Extremely Satisfied ----- Dissatisfied

Legend : Yellow > 79% | Orange 70% to 79% | Red < 70%

Staff's Performance	<div style="background: linear-gradient(to right, yellow, orange, red); height: 15px;"></div>
The Facility	<div style="background: linear-gradient(to right, yellow, orange, red); height: 15px;"></div>
Our Products	<div style="background: linear-gradient(to right, yellow, orange, red); height: 15px;"></div>
Loyalty	<div style="background: linear-gradient(to right, yellow, orange, red); height: 15px;"></div>
Overall	<div style="background: linear-gradient(to right, yellow, orange, red); height: 15px;"></div>

Regional Manager's View of District Executive Summary Page

Regional Recap

A National-level executive who has been assigned all stores in the system will see a Summary Report page like that seen by a district manager, but with a Regional recap at the top, followed by the District Recap.

Clicking on a region name opens a new browser window with an Executive Summary page which is the same as that seen by the manager in charge of the region, including the same Summary Report and raw survey data links.

WELCOME | NATIONAL_ACCOUNTS
GO TO EXECUTIVESUMMARY

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Recap - Region	
Region	Staff's Performance
Class 1: Gold Level Status (Above 79%)	
1 West	82 %
2 East	81 %
Class 2: Silver Level Status (70% - 79%)	
3 Mid	75 %

Click here for the regional-level Executive Summary page.

Recap - District	
District	Staff's Performance
Class 1: Gold Level Status (Above 79%)	
1 District 3	92 %
2 District 2	83 %
3 District 4	82 %
Class 3: Bronze Level Status (Below 70%)	
4 District 1	56 %

Click here for the district-level Executive Summary page.

Excel

RESULTS - National Detailed Summary by Store:

Store	District	Region	Staff's Performance
Class 1: Gold Level Status (Above 79%)			
Chilliwack	District 2	West	100 %
Abbotsford	District 3	Mid	92 %
Guildford	District 4	East	92 %
Richmond	District 2	West	89 %
Langley	District 2	East	85 %
Class 2: Silver Level Status (70% - 79%)			
East Van	District 4	East	77 %
Delta	District 1	East	74 %
Class 3: Bronze Level Status (Below 70%)			
Willowbrook	District 2	Mid	43 %
Hope	District 1	West	38 %

Click here for the Store Manager's Executive Summary page.

National-Level Summary Report