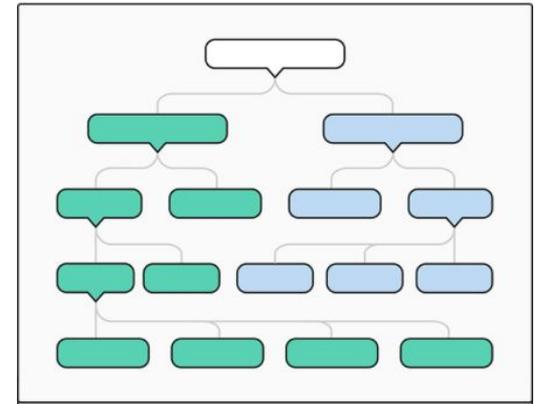


CustomerGauge Hierarchy



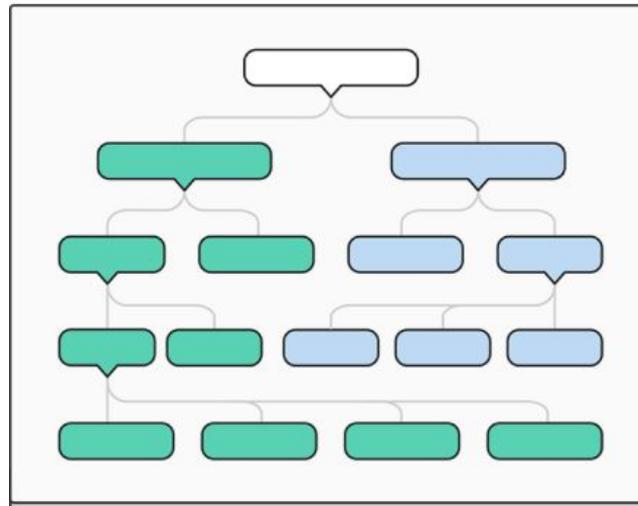
Product Team
(Public Version)
CustomerGauge

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3. Features
 - a. Hierarchy Filter
 - b. Hierarchy Report
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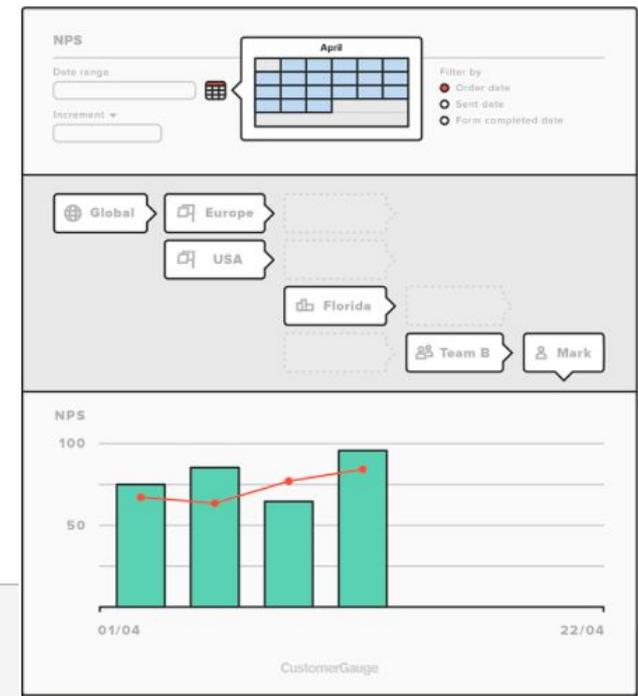
What is Hierarchy?

- A way to
 - Present a company's internal organization in the tool
 - Determine data access accordingly
 - Adapt your analysis as your company changes and grows



Benefits of Hierarchy

- Dig deep into individual performance by division/team and look at each level of your company using CustomerGauge's Hierarchy Report.
- Customize data access so information is provided on a position-based level. Agents only see their own data, mid-level managers see their team's data and upper management receive the company-wide view.
- Easily set up new organization layers, such as management.
- View NPS scores, response rates, and more from the executive level to customer service with the Hierarchy Filter/Picker.



Features - Hierarchy Filter

The Hierarchy filter allows you to drill down into your company's hierarchy in each report

The screenshot displays the CustomerGauge dashboard interface. On the left, a gauge chart shows an NPS score of 46. The dashboard includes an 'NPS SUMMARY' section with a bar chart showing 18% detractors, 18% passives, and 64% promoters. A 'SETTINGS' panel is open on the right, showing 'DATE SETTINGS' and 'FILTER SETTINGS'. The 'FILTER SETTINGS' section has a dropdown menu set to 'Office - (Hierarchy f)' which is circled in yellow. Below this dropdown is a list of office locations: Global, APAC, Australia, Singapore, EMEA, LATAM, and NORAM, each with a plus or minus icon. A blue 'Apply settings' button is visible at the bottom right of the settings panel.

Category	Value
Global	-
APAC	-
Australia	+
Singapore	+
EMEA	+
LATAM	+
NORAM	+

Features - Hierarchy Filter

The Hierarchy filter allows you to drill down into your company's hierarchy in each report

 Global 
--

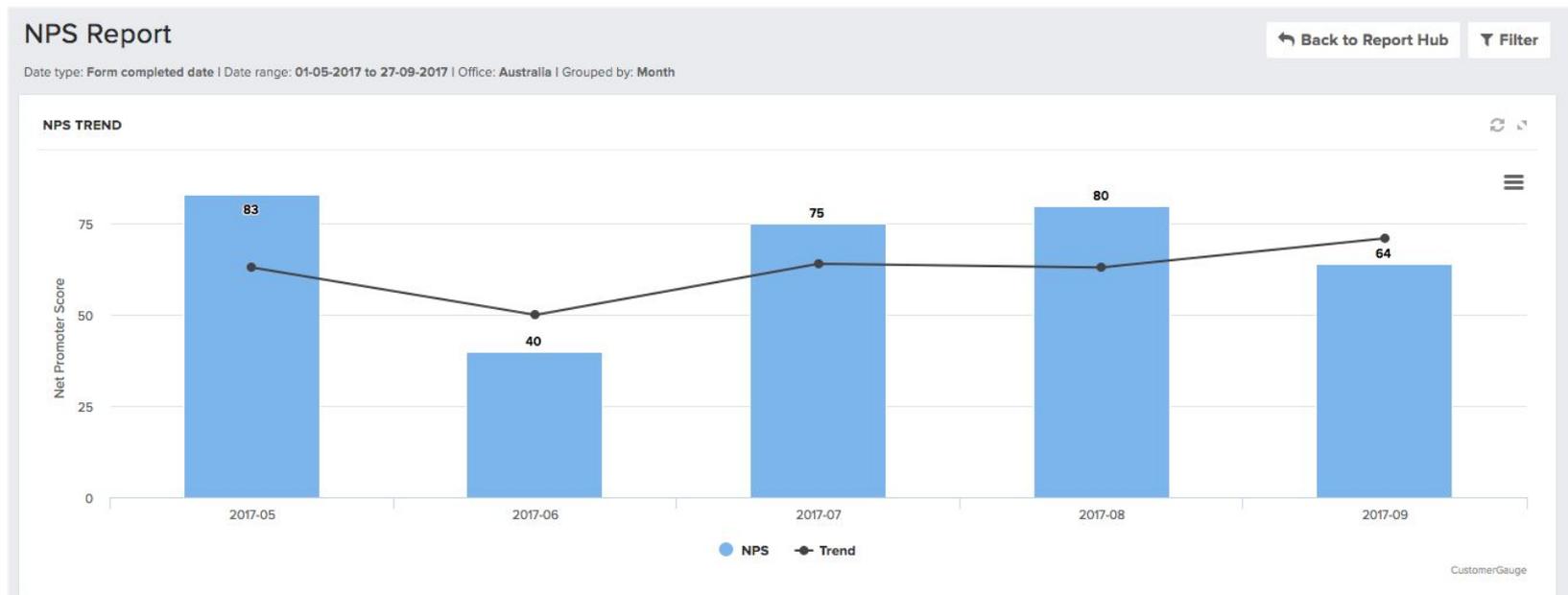
 Global 
 APAC 
 EMEA 
 LATAM 
 NORAM 

 Global 
 APAC 
 Australia 
 Singapore 
 EMEA 
 LATAM 
 NORAM 

 Global 
 APAC 
 Australia 
 Perth Office 
 Sydney Office 
 Singapore 
 EMEA 
 LATAM 
 NORAM 

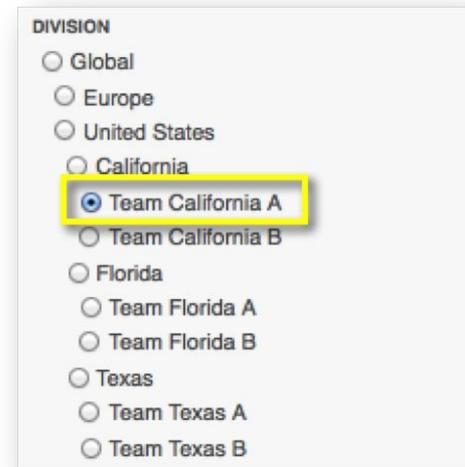
Features - Hierarchy Filter

The Hierarchy filter allows you to drill down into your company's hierarchy in all Standard Reports and Report Hub Reporting Widgets.



Features - Hierarchical Data Access

Hierarchy allows advanced control over who sees what data. Users get access to their level and below...



A screenshot of a web form titled "DIVISION". It contains a list of radio button options: Global, Europe, United States, California, Team California A, Team California B, Florida, Team Florida A, Team Florida B, Texas, Team Texas A, and Team Texas B. The "Team California A" option is selected, indicated by a blue dot in the center of the radio button, and is highlighted with a yellow rectangular border.

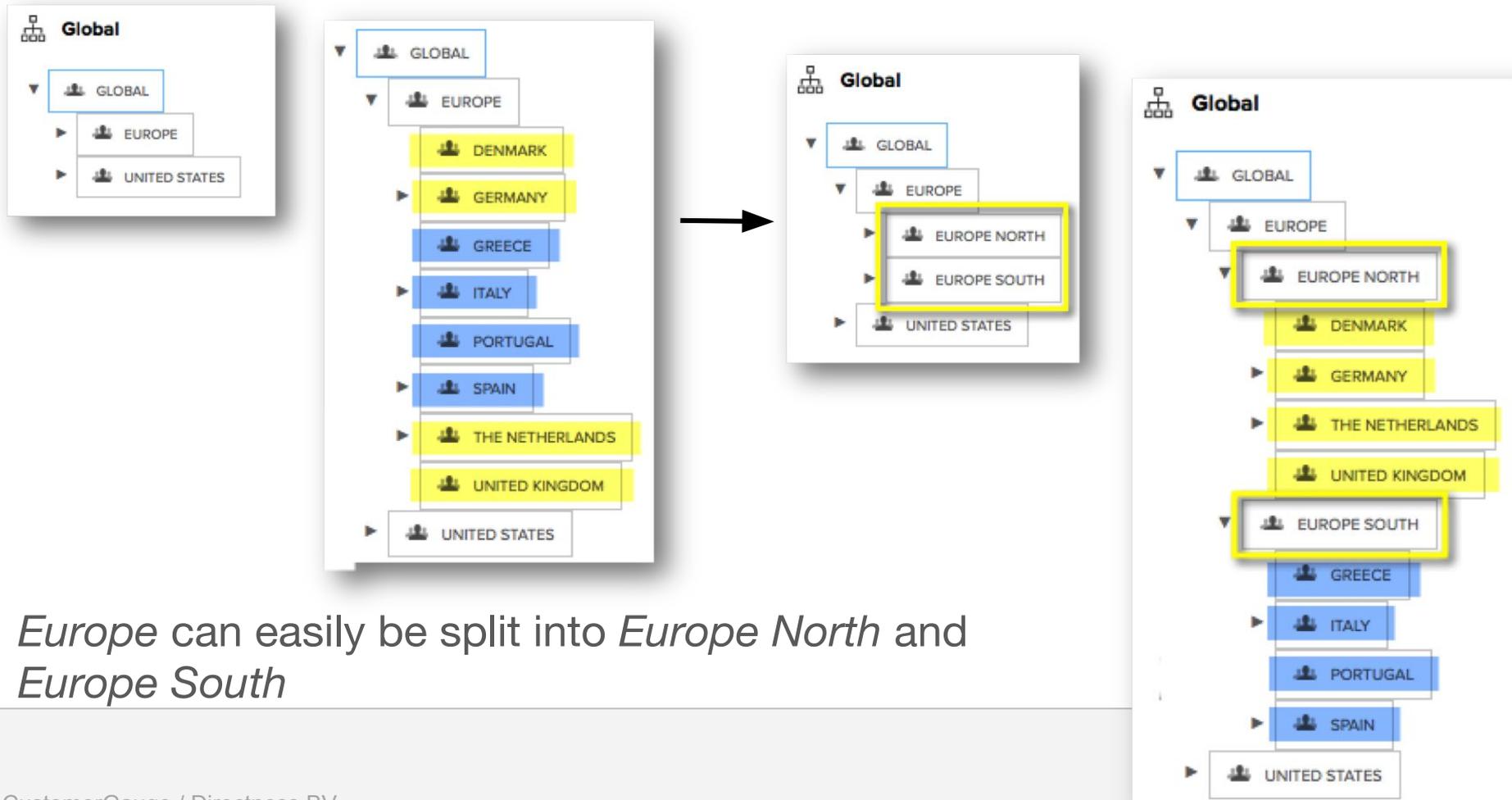
.....or even only to their 'own' data (survey results of customers they dealt with).



A screenshot of a web form element labeled "AGENT LOGIN". It features a radio button set with "Y" selected (indicated by a blue dot) and "N" unselected. The entire element is highlighted with a yellow rectangular border.

Features - Adapt to your Organization

Hierarchy can be adapted as your organization changes and grows:



Europe can easily be split into Europe North and Europe South

Hierarchy - For who?

If any of the following applies, Hierarchy may be just what you require for optimal reporting and data security:

- Medium to large company
- Hierarchical company structure
- Many users
- Sensitive customer data

Hierarchy - Pricing and requirements

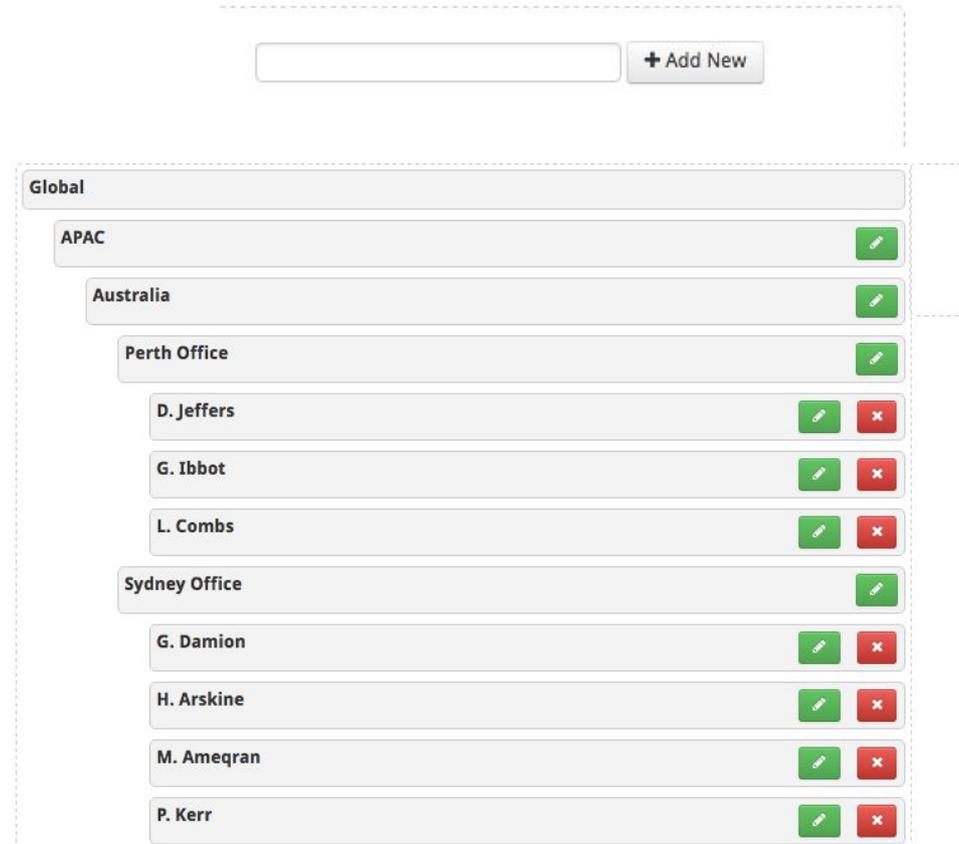
- Each company has its own structure - therefore CustomerGauge set ups each hierarchy to meet your company's specific requirements
- For a speedy implementation (a day or two) you should be able to provide:
 - Your finalized data structure (format, order, field names)
 - A sample data file (no real customer data)
 - A schema of your company's internal structure (teams, departments, etc)
 - Indicate which data field should be used to match records to their correct place in the hierarchy (often this will be 'team name')
- Hierarchy can also be set up via API. Refer documentation [here](#).
- Hierarchy may be added to your CustomerGauge Enterprise system for an additional fee per month - contact the account team for a quote

How to modify hierarchy

Once hierarchy is setup, we know the next step is to allow modifications. HR moves or changes to teams means this can be frequent or occasional.

We have two methods of changing

1. Occasional: This can be done by the CSM team on a change request. It is done in a “Drag and drop” interface that is currently only available to CSM.
2. Automated Changing: For companies where changes are more frequent, the company can upload a “Hierarchy file” to CustomerGauge as often as needed. This is done with a simple connection to our SFTP server, and the changes are made overnight. See the appendix for details. We also have the option to update via API. Refer the API Documentation [here](#).

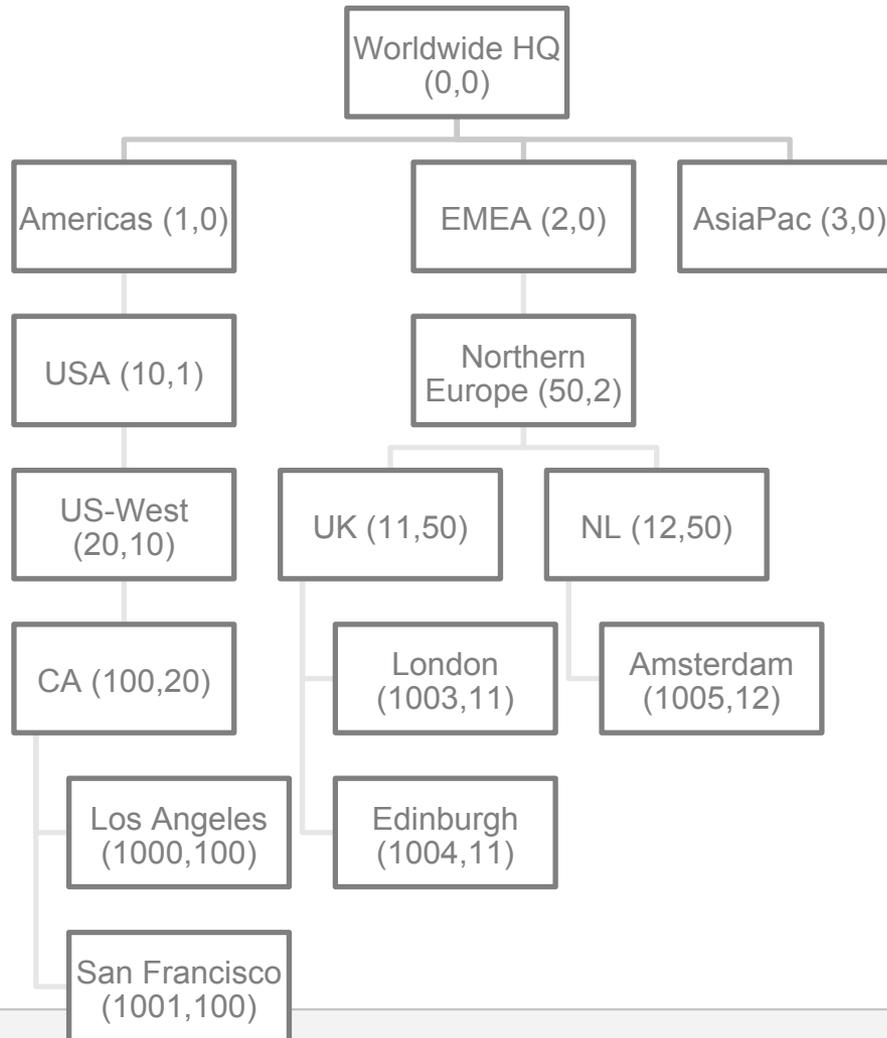


Manually Editing the Hierarchy in our Admin Panel (Occasional method)

Automated Changing of Hierarchy

Example Hierarchy Structure

[Division Name,(Division ID, Parent ID)]



The hierarchy is described by a file containing the Division ID, Division Name and the Parent ID. In this way, a complex chart can be drawn with many 1000s of nodes and a structure of n-levels. It can be modified endlessly.

The structure is a data tree. It should contain no duplicates, and no empty parent nodes - for more details please contact our CSM team.

Input File (CSV)

DivisionID	DivisionName	ParentID
0	Worldwide HQ	0
1	Americas	0
2	EMEA	0
3	AsiaPac	0
10	USA	1
20	US-West	10
100	CA	20
1000	Los Angeles	100
1001	San Francisco	100
50	Northern Europe	2
11	UK	50
12	NL	50
1003	London	11
1004	Edinburgh	11
1005	Amsterdam	12

More information?

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