



**AdvantageReport**  
VOICE OF THE CUSTOMER

## Customer Team Training Guide

Navigating the Advantage Report Dashboard  
and Your Advantage Report Results

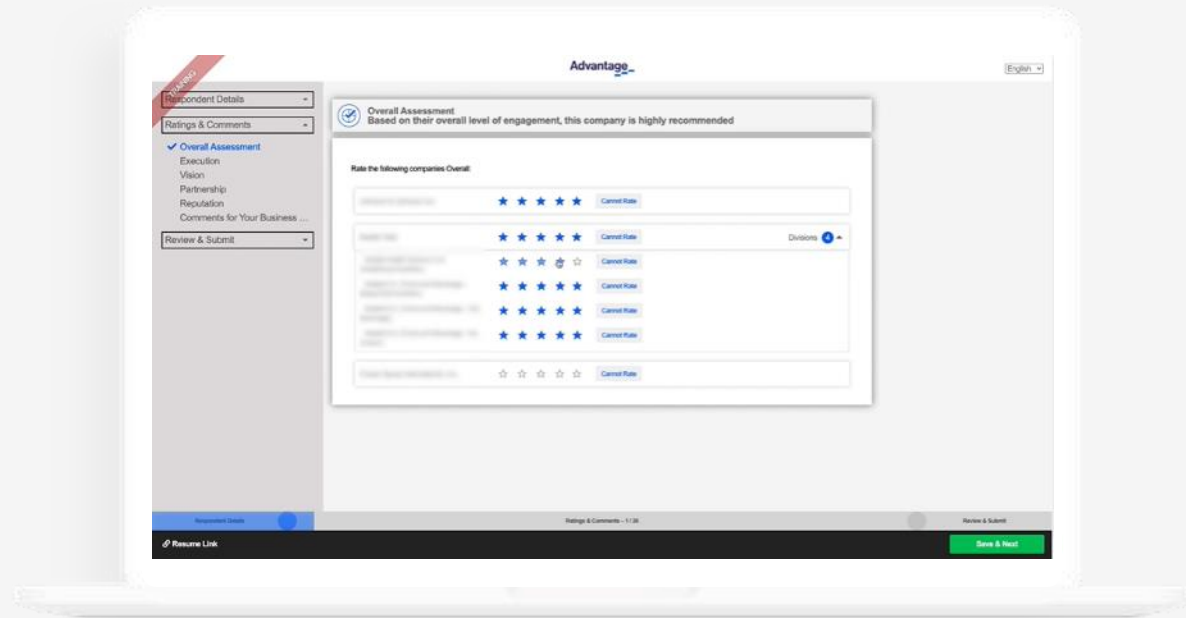
Designed for Key Account Managers

**Advantage\_**



# **Understanding the Advantage Scoring Methodology**

# The Advantage Survey uses a 5-star rating scale:



Customers rate your organization and others using this scale.

# Scoring Methodology

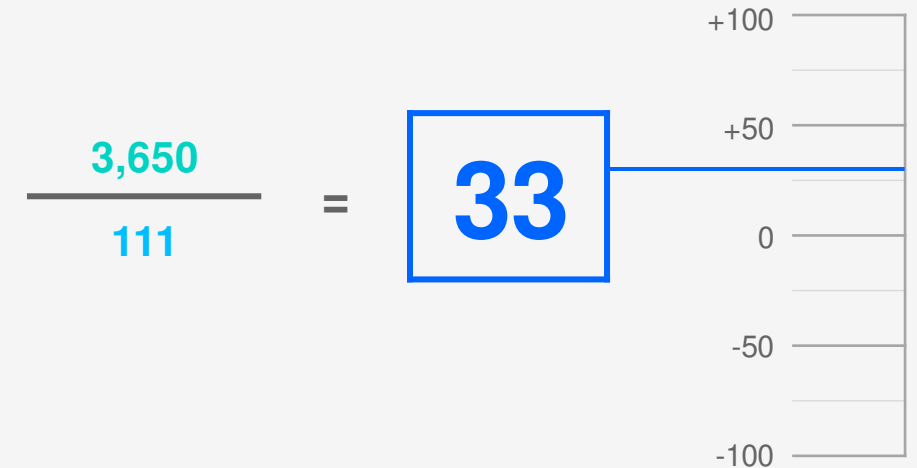
- Each start rating of 1 to 5 is converted to a score of -100 to +100.
- The score for the company/division is an average of the scores from the respondents in the company/division.

Example: Advantage Score Calculation					
Star Rating	Score / Points	x	# of Respondents	=	Calculated Aggregate
5	100	x	60	=	6,000
4	50	x	15	=	750
3	0	x	4	=	0
2	-50	x	2	=	-100
1	-100	x	30	=	-3,000
			<b>111</b>		<b>3,650</b>

NOTE: Sample data used

## Example: Advantage Score Calculation

This calculation takes the total aggregate (3,650) and divides it by the total number of respondents (111) to get the score (33).



Advantage Score is then applied to the benchmark set to determine Rank

Top-tier	The top third of ranked companies
Mid-tier	The middle third of ranked companies
Bottom-tier	The bottom third of ranked companies

## Advantage Scores are then ordered from highest to lowest to arrive at the rank:

- Rank represents the highest to lowest score.
- The supplier with the highest score ranks at the top, and the supplier with the lowest score ranks last.

### The ranking is then divided into three ranking tiers:

<b>Top-tier</b>	Top third of ranked companies
<b>Mid-tier</b>	Middle third of ranked companies
<b>Bottom-tier</b>	Bottom third of ranked companies



# **Navigating Your Advantage Report**

# Accessing Your 2023 Advantage Account Reports

**Step 1:** You will need a username and password to access your Advantage Report through the myAdvantage portal.

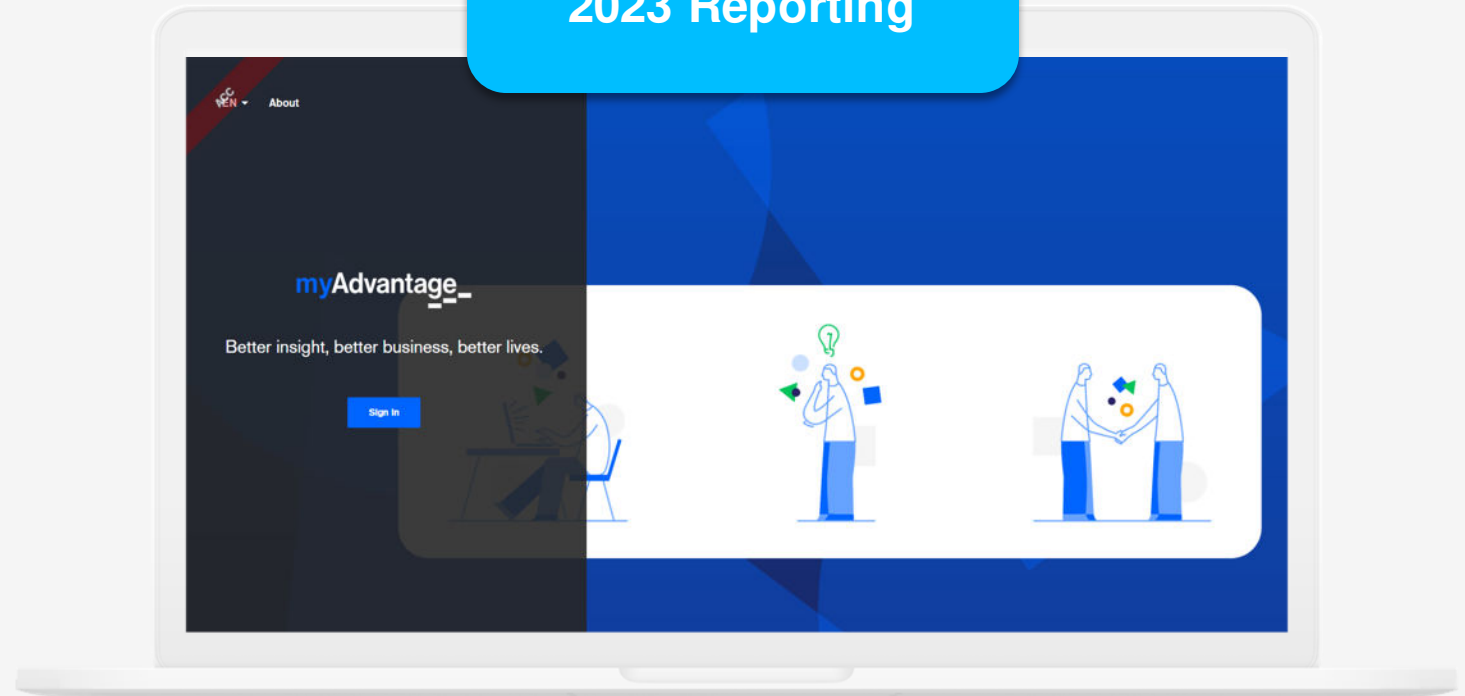
- Not sure of your login credentials? Check your inbox or junk folder for an email from OKTA (Access Management) .
- Need additional login support? Contact your [local Advantage Advisor](#).

**Step 2:** Log in to access your reports.

Log in at: <https://my.advantagegroup.com/>

- Forgot your password? Follow the prompts.
- For the best user experience, we recommend using Google Chrome or Microsoft Edge.

Available for your  
2023 Reporting





# **Navigating Your Account/Customer Level Views**



# Dashboard Navigation

Use the dropdown menu in the top-left-hand corner to navigate between the available dashboards in your report.



The screenshot displays the AdvantageReport dashboard interface. At the top, a blue header bar contains the text "Performance Spotlight" with a dropdown arrow. Below this, a white dropdown menu is open, listing several navigation options: "Executive Summary", "Performance Overview", "Performance Spotlight" (which is highlighted in grey), "Performance Details", "Analysis", "Priorities", and "Verbatim Comments". The main dashboard area features a row of four green circular gauges, each showing a percentage (e.g., 88%, 85%, 82%, 80%). Below the gauges is a table with columns labeled "Metric", "Target", "Actual", "Trend", and "Status". The table contains several rows of data with cells colored in green, orange, or red. To the right of the table is a line chart showing data trends over time.

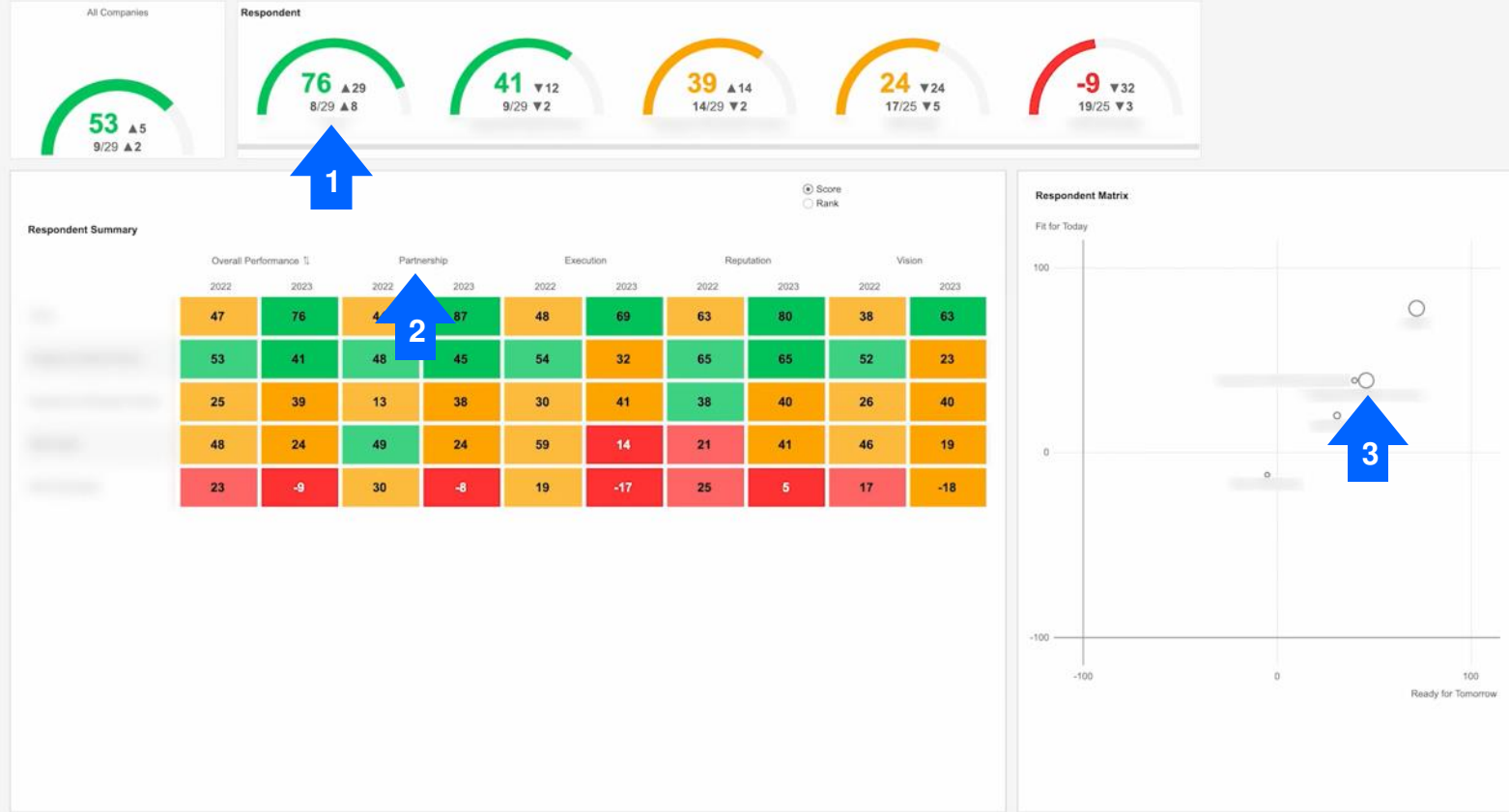
# Performance Spotlight

Designed for leaders and teams responsible for specific groups of respondents within the report, providing valuable insights into their team's KPIs and areas of opportunity.

**Step 1:** Find your Overall engagement score with each key trading partner, listed in descending order of your performance.

**Step 2:** Analyze your Overall and Engagement Driver scores or ranks and compare these results to prior year.

**Step 3:** Assess your "Fit for Today" and "Ready for Tomorrow" scores for each trading partner. The size of the dot represents the percentage of total market sales of each key trading partner.



Watch Dashboard Demo:  
<https://advantagegroup.wistia.com/medias/2nlmnl8ns>



**New in 2023:** Trend information and the option to switch between score and rank on the Respondent Summary chart

# Performance Details

For users seeking more in-depth insight and access to comprehensive data, the Performance Details dashboard offers more granular information about your engagement with key trading partners.

**Step 1:** Click on an account to highlight your performance.

**Step 2:** Review your performance by competency in the selected account. Sort by score, rank, priority, score change and rank change

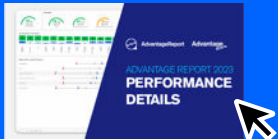
**Step 3:** View the range of scores by account. The red dot represents the lowest score given to a supplier by the account; the light grey dot represents the average score given by the account across all suppliers; the blue dot represents the score the account gave your company, and the green dot represents the highest scoring supplier in the account.

**Step 4:** Read the verbatim comments from an interview given by the selected account.



**New in 2023:** Sort Competencies by 'Score Change' and 'Rank Change', View trend information in hover overs.

Watch Dashboard Demo:  
<https://advantagegroup.wistia.com/medias/6hotzyx9zp>



# Analysis

Establish your priorities by gaining valuable context of your ranks and scores and insights into your distribution of ratings by competencies. Identify strengths, areas for improvement, and potential pain points in your relationships with respondents on specific competencies.

**Step 1:** Click on an engagement driver to filter its corresponding competencies below.

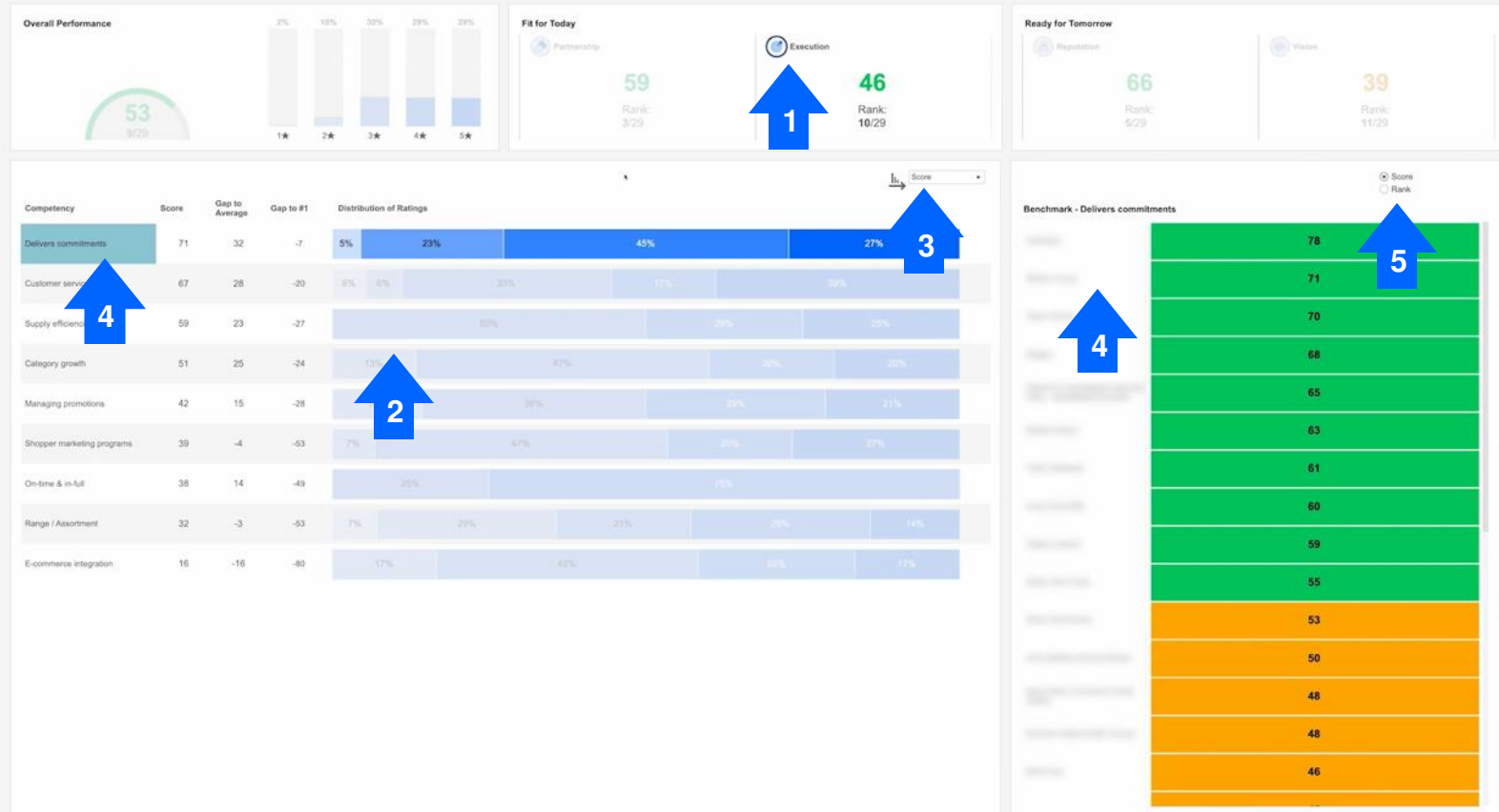
**Step 2:** Review your company's results by competency score, gap to average, gap to number one supplier and distribution of ratings.

**Step 3:** Sort the chart by Score, Gap to Average and Gap to number one.

**Step 4:** Click on a competency to view the benchmark performance in the table to the right.

**Step 5:** Review your competency performance against your competitors and toggle between score and rank

*Trend will be added at a later date.*



Watch Dashboard Demo:  
<https://advantagegroup.wistia.com/medias/z63vhh9q5o>



**New in 2023:** Sort Competencies by Score, Gap to Average and Gap to #1 and toggle your Benchmark performance by Rank and Score

# Priorities

**Step 1:** Where available, select a trading partner from the dropdown menu and view their priorities from highest to lowest.

**Step 2:** Discover your business's performance in each competency by understanding your gap to the average score or the best-in-class company against your selected partners' priority.

**Step 3:** Select a competency from the Priority Rank chart to isolate its position in the Priority Score vs. Performance Matrix.

**Step 4:** Hover over a competency in the matrix to reveal additional information. Trend information has been added to this section of the report.

Analyze your performance by competency against your key trading partners' priorities. This is the ideal dashboard to support your action planning discussions.



Watch Dashboard Demo:  
<https://advantagegroup.wistia.com/medias/beuxjfpuij>



**New in 2023:** View trend information in table and in hover overs.

# Verbatim Comments

Verbatim Comments dashboard contains the interview and textbox feedback collected from program respondents. Respondent comments help you identify the emotions and drivers behind specific ratings to better understand the opportunities for improvement.

**Step 1:** Filter verbatim comments by comment type, respondent, engagement driver, competency and sentiment.

**Step 2:** To download this dashboard, click the download icon in the bottom right and select your desired file format.

**Step 3:** To download your comments directly as a spreadsheet, click the green XLS icon in the top right and select your desired file format.

*If you cannot see comments within your reporting dashboard, they may be available to download in the myAdvantage portal. Your Advantage Advisor can support you with questions about accessing your verbatim comments.*

Comments	Respondent	Engagement Driver	Competency	Sentiment
		Execution	Execution	Strength
		Overall Performance	Overall Performance	Strength
		Partnership	Supports our strategy	Strength
		Execution	Delivers commitments	Strength
		Reputation	Capability & experience	Strength
		Partnership	Collaborative forecasting	Strength
		Partnership	Communication	Strength
		Reputation	Cross-functional alignment	Strength
		Execution	On-time & in-full	Opportunity/Weakness
		Overall Performance	Overall Performance	Opportunity/Weakness

- Image
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Share

Watch Dashboard Demo:  
<https://advantagegroup.wistia.com/medias/zxhn5sdxs>



# Actioning Your Advantage Report Feedback: 4 Steps to Success

Pursue a continuous customer engagement process for sustainable success.



## Step 1: Sharing the Results Internally

- ✓ Understand feedback and insights and cascade them throughout the organization.
- ✓ Ensure that customer feedback is prioritized and everyone plays a role.



## Step 2: Goal Setting and Action Planning

- ✓ Establish accountability for how you wish to improve.
- ✓ Consider the opportunities and implications for business growth.



## Step 3: Engaging and Communicating with Your Customers

- ✓ Lead discussions with your customers on their feedback.
- ✓ Design a clear path to action to ensure insights translate into business action and transformation.



## Step 4: Preparing for the Next Wave of Customer Feedback

- ✓ Build a plan to track and measure your improvements, commit to the next wave of feedback and continuously improve the way you work with customers.



### Learn More:

<https://www.advantagegroup.com/4steps/SUP/1>

### Learn More:

<https://www.advantagegroup.com/4steps/SUP/2>

### Learn More:

<https://www.advantagegroup.com/4steps/SUP/3>

### Learn More:

<https://www.advantagegroup.com/4steps/SUP/4>

NEED HELP?

**For Advantage Report technical support  
and troubleshooting, please visit:**

**<https://www.advantagegroup.com/help>**

**<https://www.advantagegroup.com>**

**Advantage**  
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