

Client

All

Section

All

Page Name

All

Role

All

Session Event

All

Session Length

All

Engagement

All

Date Range

6/24/2024

Total GA Sessions with at least ONE CRM Event by Month/Week

Total Session count per day

Tenant

Sessions

60K

40K

20K

0K

51.91K

55.83K

55.59K

56.50K

55.91K

55.78K

55.77K

46.61K

56.66K

56.82K

53.33K

51.63K

50.72K

11.11K

Aug 2024

Sep 2024

Oct 2024

26K

28K

27K

28K

28K

27K

27K

23K

27K

28K

24K

23K

25K

5K

26K

28K

28K

28K

28K

28K

29K

24K

30K

29K

29K

29K

26K

6K

Sessions by Client

346K

(48%)

368K

(52%)

Total Sessions by Role

Role	N	%
Advisor	313339	43.87%
BAA	211592	29.63%
Bos Contact	150876	21.13%
Fee Only Advisor	19621	2.75%
Employee	9527	1.33%
Agent	6857	0.96%
Authorized Trader	2297	0.32%
Prospect	43	0.01%
	15	0.00%
Total	714167	100.00%

CRM Events per Session Distribution

CRM Events	N	%
2.00	98385	13.78%
1.00	52262	7.32%
3.00	48732	6.82%
4.00	39168	5.48%
5.00	28399	3.98%
6.00	27580	3.86%
7.00	21749	3.05%
8.00	21020	2.94%
9.00	18585	2.60%
10.00	17177	2.41%
11.00	14768	2.07%
12.00	13966	1.96%
13.00	12540	1.76%
14.00	11877	1.66%
Total	714167	100.00%

Section Frequency per Session

Section	N	%
Overview	446529	62.52%
Activities	419644	58.76%
People	273539	38.30%
Household	61413	8.60%
Dynamic	23631	3.31%
Workflows	13851	1.94%
Connections	11782	1.65%
Total	714167	100.00%

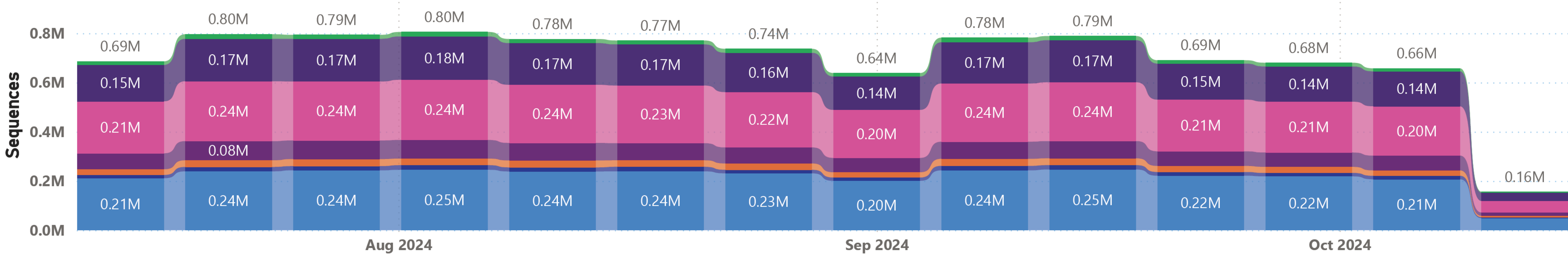
Page Frequency per Session

Page	N	%
Overview	446529	62.52%
Activities	228088	31.94%
People	193092	27.04%
Activities Task	190932	26.73%
People Details	178843	25.04%
Activities Note	124265	17.40%
Activities Appointment	115205	16.13%
Activities Email	107910	15.11%
Activities PhoneCall	67659	9.47%
Household Edit	57348	8.03%
Household	47683	6.68%
Activities I360 Message	30994	4.34%
Dynamic Workflow	19403	2.72%
Workflows	13851	1.94%
Total	714167	100.00%

Total CRM Sequences within GA sessions with at least ONE CRM event by Week/Month

Total Event Count across Sessions with at least one CRM related event

Section ActivitiesConnectionsDynamicHouseholdOverviewPeopleWorkflows



CRM Sequences by Role, Events and Time (Medians)

N	Role	Events	Minutes
1260531	BAA	3.00	0.20
1177447	Advisor	3.00	0.23
1145528	Bos Contact	3.00	0.35
86713	Fee Only Advisor	3.00	0.38
49466	Employee	2.00	0.10
31173	Agent	3.00	0.18
13520	Authorized Trader	4.00	0.35
317	Prospect	4.00	0.25
82		2.00	0.24
3764777		3.00	0.25

CRM Sequences by Name with Specific Event Count

N	FullName	Events
5988		2.00
3327		2.00
2413		2.00
2412		4.00
1985		2.00
1974		4.00
1877		2.00
1750		1.00
1609		2.00
1530		1.00
1475		3.00
1464		1.00
1455		2.00
1445		1.00
3764777		

Last Session Page BEFORE CRM Sequence

Page Root URL	N	%
households/Dashboard	1776904	47.20%
applications/P360/Households/Activities.aspx	231146	6.14%
a360-dashboard/Dashboard	207162	5.50%
households/Holdings	188735	5.01%
	166689	4.43%
households/Insurance	144495	3.84%
households/Documents/Overview	141430	3.76%
	114807	3.05%
applications/P360/Households/Households.aspx	113966	3.03%
a360-dashboard/EnhancedSearch	94346	2.51%
households/AccountProfile	56367	1.50%
households/Activity		
Total	3764777	100.00%

First Session Page AFTER CRM Sequence

Page Root URL	N	%
households/Dashboard	1542946	40.98%
	306364	8.14%
a360-dashboard/Dashboard	227617	6.05%
applications/P360/Households/Activities.aspx	226801	6.02%
households/Holdings	185900	4.94%
households/Documents/Overview	181966	4.83%
	148228	3.94%
a360-dashboard/EnhancedSearch	142977	3.80%
applications/P360/Households/Households.aspx	124067	3.30%
households/AccountProfile	90344	2.40%
applications/P360/framework.a	85887	2.28%
Total	3764777	100.00%



Client

All

Session Event

All

Role

All

Section

All

Page Name

All

Session Length

All

Date Range

6/24/2024

Total CRM Events within GA sessions with at least ONE CRM event by Week/Month

Total Event Count across Sessions with at least one CRM related event

Section

Activities

Connections

Dynamic

Household

Overview

People

Workflows

Events

2.0M

1.5M

1.0M

0.5M

0.0M

1.72M

0.27M

0.40M

0.89M

1.96M

0.31M

0.45M

1.01M

1.95M

0.30M

0.43M

1.04M

2.01M

0.33M

0.44M

1.06M

1.91M

0.29M

0.43M

1.02M

1.89M

0.29M

0.43M

1.01M

1.83M

0.27M

0.41M

0.99M

1.57M

0.23M

0.35M

0.85M

1.91M

0.28M

0.43M

1.04M

1.90M

0.27M

0.43M

1.03M

1.65M

0.21M

0.38M

0.93M

1.58M

0.20M

0.37M

0.89M

1.47M

0.21M

0.34M

0.79M

0.39M

0.21M

Aug 2024

Sep 2024

Oct 2024

Session Events by Client

9M (38%)

15M (62%)

Session Events by User/Role

N	Name	Role
57994		BAA
44414		Employee
41053		BAA
39957		Bos Contact
38869		BAA
38055		Employee
34765		Bos Contact
34511		BAA
34406		Bos Contact
33809		Bos Contact
33682		BAA
32539		Bos Contact
32454		Fee Only Advisor
23739669		

Session Event Count

Events	N	%
click_internal	11933131	50.27%
page_view	6188777	26.07%
scroll	2463455	10.38%
user_engagement	1928733	8.12%
form_start	719346	3.03%
click	183941	0.77%
view_search_results	174126	0.73%
session_start	147062	0.62%
first_visit	975	0.00%
file_download	123	0.00%
Total	23739669	100.00%

Session Events by Section

Section	N	%
Activities	12773996	53.81%
Overview	5383523	22.68%
People	3511162	14.79%
Household	1115463	4.70%
Dynamic	801192	3.37%
Workflows	90714	0.38%
Connections	63619	0.27%
Total	23739669	100.00%

Session Events by Page

Page	N	%
Overview	5383523	22.68%
Activities Task	5218802	21.98%
Activities	2703402	11.39%
People Details	2290806	9.65%
Activities Appointment	1401531	5.90%
Activities Note	1352218	5.70%
People	1220356	5.14%
Activities Email	956697	4.03%
Activities PhoneCall	854484	3.60%
Household Edit	836435	3.52%
Dynamic Applied Workflow	378896	1.60%
Dynamic Workflow	300330	1.27%
Household	279028	1.18%
Activities I360 Message	270799	1.14%
Total	23739669	100.00%

Client

Role

Page Name

Section

Name

City

State/Region

Date Range

All

All

All

All

All

All

All

6/24/2024

10/15/2024

Active UNIQUE Returning and New Users by Month/Week

Daily unique users with at least ONE event count (1 per user per day)

User Type

New User

Returning User

Users

16.47K

7.4K

9.98K

9.40K

9.37K

9.24K

9.21K

9.21K

8.92K

9.31K

9.23K

9.12K

9.03K

8.90K

5.42K

9.0K

8.4K

8.7K

8.9K

8.9K

8.9K

8.9K

8.7K

9.1K

9.0K

8.9K

8.9K

8.7K

5.4K

Aug 2024

Sep 2024

Oct 2024

Unique Users by Client

346K

(48%)

368K

(52%)

Unique Users

Role	N
Advisor	6518
BAA	3431
Bos Contact	2217
Employee	951
Agent	559
Fee Only Advisor	272
Authorized Trader	29
Prospect	3
	1
Total	13981

Pages Visited by % of Users

Section	N	%
Overview	12793	91.50%
People	12101	86.55%
Activities	10318	73.80%
Household	8243	58.96%
Connections	3683	26.34%
Workflows	2180	15.59%
Dynamic	1898	13.58%
Total	13981	100.00%

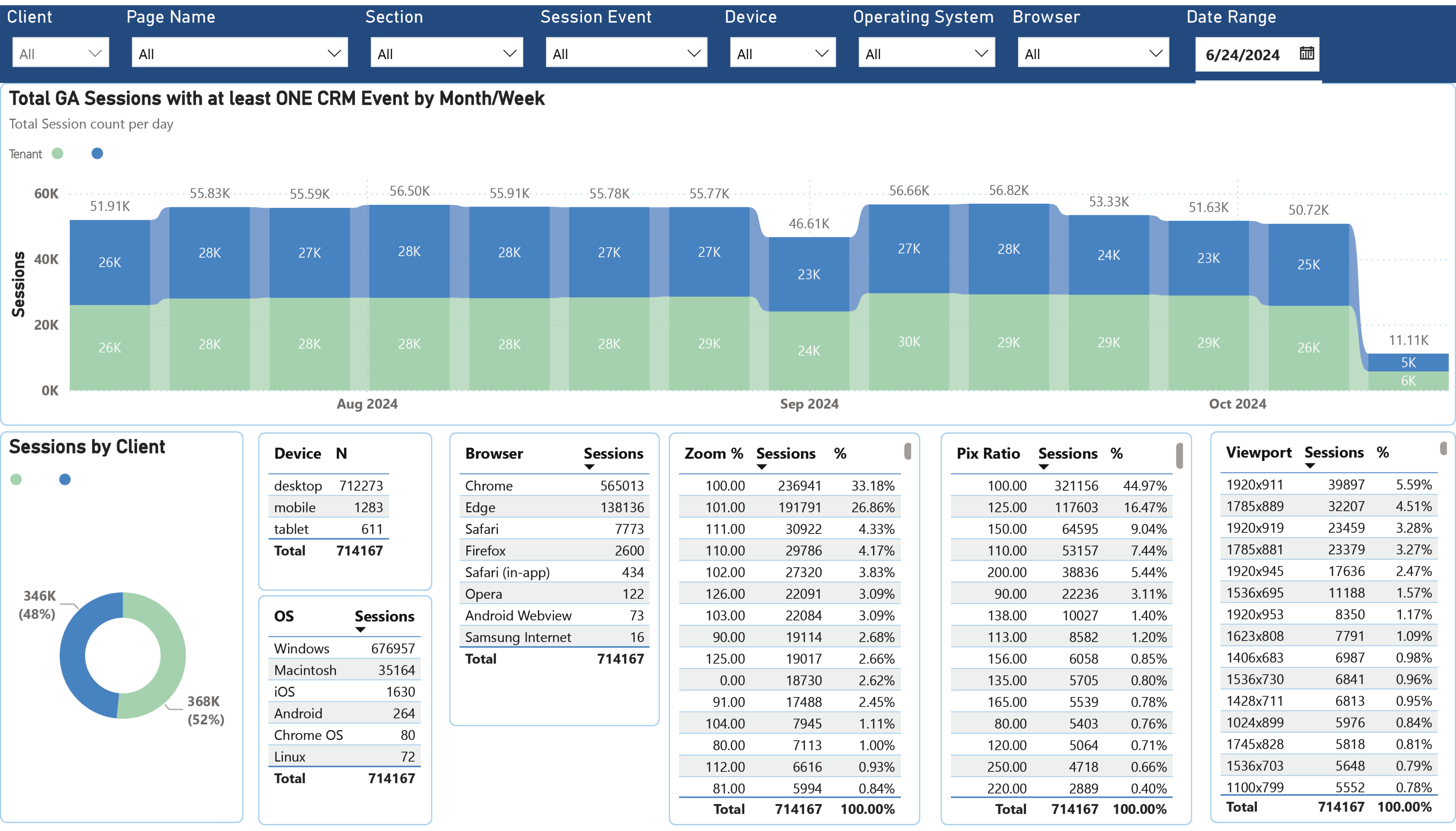
Pages Visited by % of Users

Page Name	N	%
Overview	12793	91.50%
People Details	11182	79.98%
People	10724	76.70%
Activities	8337	59.63%
Household Edit	7758	55.49%
Activities Note	7205	51.53%
Household	6971	49.86%
Activities Email	6811	48.72%
Activities	6373	45.58%
Appointment		
Activities Task	5833	41.72%
Activities PhoneCall	5010	35.83%
Activities I360 Message	3863	27.63%
Total	13981	100.00%

Total Sessions by Geography

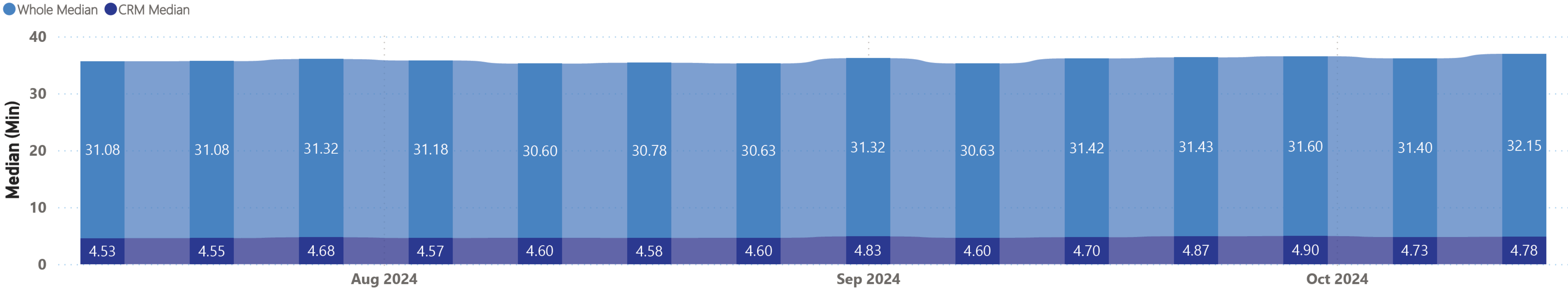
N	City	State/Region	Country
70241	Chicago	Illinois	United States
61326	New York	New York	United States
61082	Boston	Massachusetts	United States
33753	Reston	Virginia	United States
22010	Atlanta	Georgia	United States
21858	Los Angeles	California	United States
14788	Denver	Colorado	United States
13766	Seattle	Washington	United States
10016	Dallas	Texas	United States
8949	Miami	Florida	United States
8000	Houston	Texas	United States
6804	San Jose	California	United States
5823	Philadelphia	Pennsylvania	United States
5310		New York	United States
714167			





Time of CRM related events in Whole GA Sessions by Month/Week (Medians)

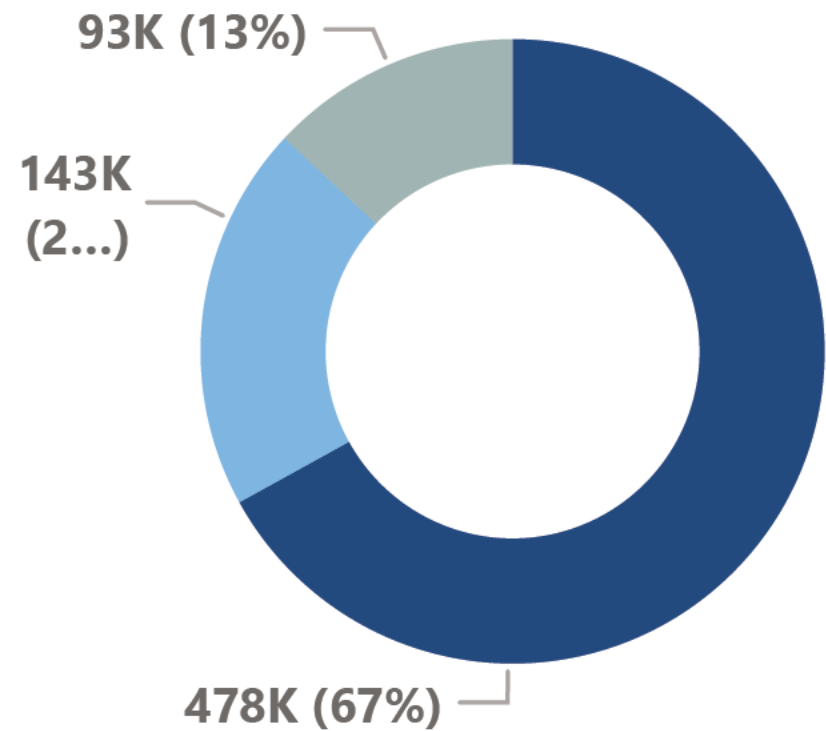
Median value of session durations, providing a balanced measure of typical session length that minimizes the impact of outliers



Session Length

High: >15' | Medium: 5'-15' | Low: <5'

● Long ● Short ● Medium



Median Time Stats (in Minutes)

Full Name	Role	Sessions	Whole Session	CRM	Events per Min	CRM Events per Min	Un. Pages per Min	CRM Un. Pages per Min
	Advisor	618	23.27	4.90	1.33	1.78	5.00	0.27
	Bos Contact	495	15.93	3.18	2.67	4.96	6.00	0.71
	Advisor	375	30.48	1.53	1.44	2.70	6.00	0.65
	Advisor	370	19.98	1.34	1.63	2.71	5.00	0.46
	Advisor	337	28.45	8.25	1.84	2.21	8.00	0.30
	Advisor	332	16.01	4.90	2.03	1.87	6.00	0.22
	BAA	324	45.44	11.53	1.31	1.73	9.00	0.23
	Advisor	311	30.82	3.48	2.39	7.75	8.00	0.92
	Advisor	305	30.22	1.83	1.16	4.09	5.00	0.70
	Bos Contact	303	18.98	6.90	1.80	2.08	6.00	0.28
	Advisor	302	60.33	6.08	1.26	1.18	10.00	0.26
	Advisor	296	37.24	8.48	1.72	3.16	7.00	0.31
	Advisor	293	25.73	4.73	1.22	2.31	5.00	0.29
	Bos Contact	292	32.36	12.68	2.68	2.72	8.00	0.24
Total		714167	31.13	4.67	1.58	2.71	7.00	0.37

# Engagement Score Glossary.

The **Session Engagement Score**provides a comprehensive measure of user interaction across sessions by combining key metrics: event count, unique pages visited, and session duration. It’s calculated with the following weights:

- **Event Count:** 40%
- **Unique Pages Visited:** 40%
- **Session Duration:** 20%

Here, the engagement score is based on the **median** values for each metric, giving a more balanced view of user behavior by reducing the impact of outliers. Here's a breakdown of each metric:

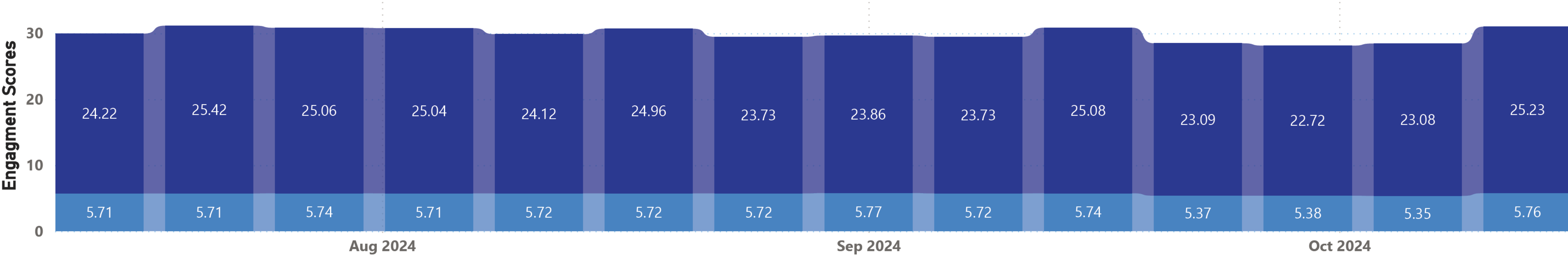
1. **Number of Sessions:** The total number of sessions a user has participated in. A higher count indicates more frequent engagement.
2. **Name:** The user’s identifying name, used for tracking engagement across sessions.
3. **Role:** The user’s role, which may impact their engagement patterns.
4. **Min Score:** The lowest engagement score across all the user’s sessions. This helps identify the least engaged session, providing insight into moments of low interaction.
5. **Max Score:** The highest engagement score across all sessions, showing the session where the user was most engaged.
6. **Events:** The **median** number of events (clicks, form submissions, page views) per session. This shows the typical level of activity for the user without being skewed by extreme highs or lows. A higher median event count suggests more frequent interaction in a typical session.
7. **Pages:** The **median** number of distinct pages visited per session. This reflects how broadly a user typically explores the platform. A higher median indicates more extensive engagement with the platform's content.
8. **Minutes:** The **median** session duration in minutes, calculated by the time between the first and last event of each session. This value gives a sense of the typical time users spend in a session, with longer durations suggesting deeper engagement.
9. **Median Score:** The overall **median engagement score** across all sessions, calculated using the weighted combination of the median event count, pages visited, and session duration. This provides a balanced measure of the user’s typical engagement level.



### Median Engagement Scores: Whole Session vs CRM by Month/Week

Session Engagement Score is a weighted metric combining event count (40%), unique pages visited (40%), and session duration (20%)

CRM Sequence Engagement Score Whole Session Engagement Score



### Median Event Count, Unique Page., Minutes and Engagement Score per User/Role (Whole Session vs CRM part of Session)

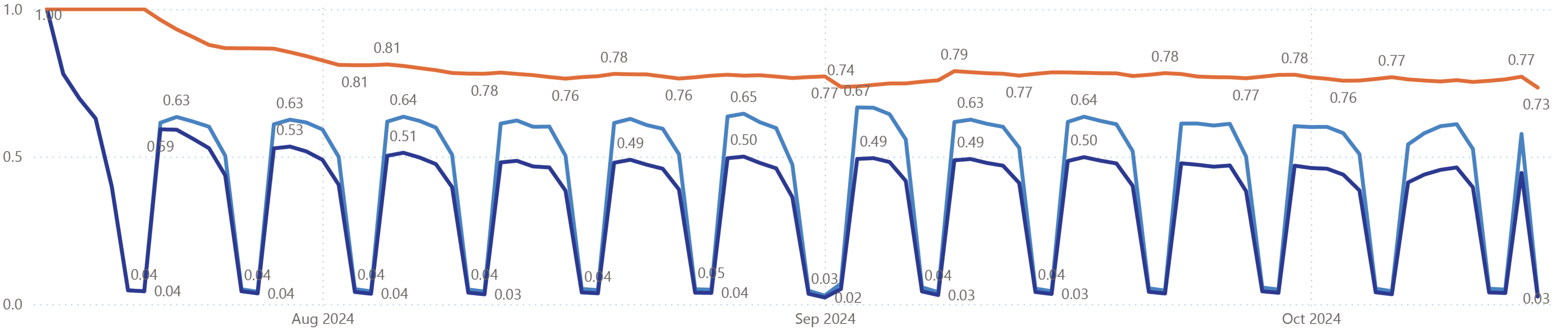
Sessions	FullName	Role	Events Whole	Events CRM	Un. Pages Whole	Un. Pages CRM	Duration Whole	Duration CRM	Engagement Whole	Engagement CRM	Median % of CRM in Whole
618		Advisor	26.00	8.00	5.00	2.00	23.27	4.90	17.05	4.98	44.60
495		Bos Contact	33.00	14.00	6.00	2.00	15.93	3.18	18.79	7.04	44.44
375		Advisor	31.00	4.00	6.00	1.00	30.48	1.53	20.90	2.31	15.00
370		Advisor	21.50	5.00	5.00	1.00	19.98	1.34	14.60	2.67	26.77
337		Advisor	46.00	14.00	8.00	3.00	28.45	8.25	27.29	8.45	42.86
332		Advisor	25.50	12.50	6.00	3.00	16.01	4.90	15.80	7.18	55.56
324		BAA	45.00	13.50	9.00	3.00	45.44	11.53	30.69	8.91	34.56
311		Advisor	74.00	30.00	8.00	4.00	30.82	3.48	38.96	14.30	44.74
305		Advisor	29.00	8.00	5.00	2.00	30.22	1.83	19.64	4.37	32.35
303		Bos Contact	28.00	13.00	6.00	2.00	18.98	6.90	17.40	7.38	53.33
302		Advisor	55.50	6.00	10.00	1.00	60.33	6.08	38.27	4.02	12.32
296		Advisor	51.50	21.00	7.00	3.00	37.24	8.48	30.85	11.30	44.44
293		Advisor	27.00	9.00	5.00	2.00	25.73	4.73	17.95	5.35	45.65
292		Bos Contact	67.00	23.00	8.00	2.00	32.36	12.68	36.47	12.54	39.49
714167			39.00	10.00	7.00	2.00	31.13	4.67	24.63	5.73	33.33



## "Stickiness" by Ratio

How many users return to the product on a regular basis

DAU/WAU Ratio DAU\_MAU\_Ratio WAU/MAU Ratio

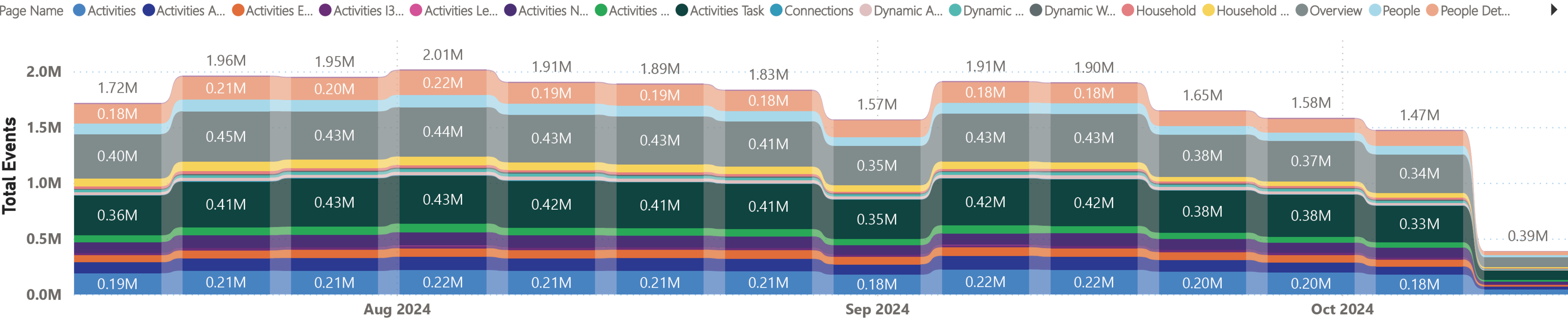


**DAU/WAU Ratio:**  
Daily Active Users (DAU) / Weekly Active Users (WAU) shows the percentage of users who engaged in the last 24 hours out of the users who engaged in the last 7 days. A higher ratio suggests good engagement and user retention.(e.g. If the DAU/WAU ratio is 0.5 (or 50%), it means that 50% of your weekly users are active on a daily basis)

**DAU/MAU Ratio:**  
Daily Active Users (DAU) / Monthly Active Users (MAU) shows the percentage of users who engaged for the calendar day out of the users who engaged in the last 30 days. A higher ratio suggests good engagement and user retention. (e.g. If the DAU/MAU ratio is 0.2 (or 20%), it means that, on average, 20% of your monthly users are using the product every single day.)

**WAU/MAU Ratio:**  
Weekly Active Users (DAU) / Monthly Active Users (MAU) shows the percentage of users who engaged in the last 7 days out of the users who engaged in the last 30 days. A higher ratio suggests good engagement and user retention. (e.g. WAU/MAU ratio is 0.7 (or 70%), it means that 70% of your monthly users are also active at least once a week.)

Total CRM Page Event Count by Week/Month



CLICK\_INTERNAL Events per Page, Type, Location and Text

N	Page Name	Event Name	Type	Location	Text
734698	Activities Task	click_internal	buttons and links		Save & Close
714092	Activities	click_internal	buttons and links	CRM Activities	Activity Subject
462793	Activities Task	click_internal	icons		Calendar
377774	Overview	click_internal	buttons and links	CRM Activities	Activity Subject
247410	Activities Task	click_internal	buttons and links		Insert Date
209712	Overview	click_internal	buttons and links	Household Search Results	Household Search Results Link
208942	Overview	click_internal	buttons and links	Page Header	Dashboard
196723	People Details	click_internal	buttons and links		Edit
186760	Activities Task	click_internal	icons		Datepicker - Next
181512	Activities Note	click_internal	buttons and links		Save & Close
162047	Activities Appointment	click_internal	buttons and links		Save & Close
159384	Overview	click_internal	buttons and links		Edit
122861	Activities Task	click_internal	buttons and links	Household Assigned To	Advisor Name
11933131					

Total Events across Sections, Pages

Total Events	Event	Section	Page Name
2579649	click_internal	Activities	Activities Task
2520112	click_internal	Overview	Overview
1746786	page_view	Overview	Overview
1671128	click_internal	Activities	Activities
1470678	click_internal	People	People Details
1102612	page_view	Activities	Activities Task
890047	scroll	Activities	Activities Task
685728	click_internal	Activities	Activities Appointment
670466	page_view	Activities	Activities
619436	click_internal	Household	Household Edit
608661	click_internal	People	People
580404	page_view	People	People Details
465372	click_internal	Activities	Activities Note
456817	page_view	People	People
23739669			