Initial thoughts 4/13/20 930 am

Query for finding Franchise/Owner/location and count of active clients in ClearCare:

SELECT f.Franchise\_Number,fo.Full\_Name,L.City + ', ' + L.State\_Code,count(\*) as Active\_Client\_Count

FROM EDW.Dim\_Franchise f

Left Join EDW.Bridge\_Client\_Franchise bcf ON bcf.CRM\_Franchise\_key = f.Franchise\_key

left Join EDW.Bridge\_Franchise\_Location bfl ON bfl.Franchise\_Key = f.Franchise\_Key

Left Join EDW.Dim\_Franchise\_Owner fo ON fo.Franchise\_Owner\_Key=f.Franchise\_Key

left join EDW.Dim\_location L ON L.Location\_Key=bfl.Location\_Key

Left join EDW.Dim\_client C ON C.Client\_Key=bcf.Client\_Key

WHERE c.Is\_Client=1

GROUP BY f.Franchise\_Number,fo.Full\_Name,L.City,L.State\_Code;

Notes on the Grand Pad data structure:

* The record key that Grand Pad seems to use is Franchise\_Number
* In the DBO.Franchise table in the Dragon-prod database there are some records that are problematic for data quality as they contain more than 3 digits in the franchise\_number field
* The Grand Pad data records are very flat

I have a copy of PowerBI desktop now so I can send Milika more meaningful mockups of reports/dashboards.

New requests from Rob Jeltema:

The Franchise Level report will need to have the following groupings:

* Subscription and Penetration Metrics
  + Total Active Client in ClearCare
  + IC Client Incompatible
  + IC eligible Clients
  + Total Subscriptions
  + Total IC Clients served
  + Buy-In Rate
  + Investment Deployed
  + Adoption Rate
  + Active Subscriptions
  + Verizon Tablets
  + T-Mobile Tablets
* Activity of the Day Metrics
  + # of Activity of the Day Calls
  + % of Grand Pad that accessed Activity of the Day at least once in time period
  + % of Grand Pad that accessed Automated AOD at least once in time period
  + AOD Leveraged During Shift
* Call Metrics
  + # of Help Button Calls (Concierge Calls)
  + % of Grand Pad tablets accessing the Help Button in time period
  + Home Instead Now Calls
  + % of tablets accessing Home Instead Now Calls
  + # of Partner Portal Calls
  + # of RPN Calls
  + % of tablets that made RPN calls
  + % of tablets that accessed Partner Portal at least once in time period
* Activity Tracking Metrics
  + Video QA
  + QA Visit
  + Integrated Care: Video
  + Video Care Giver supervisory visit
  + Video Client Relationship building
  + Video Intro
  + Closed/Won IC
  + On demand Client
  + On demand Care Giver
  + Audio Calls
* CG Clock-In Metrics
  + Care Giver clock-in via Grand Pad
  + Care Giver clock-out via Grand Pad
  + Care Giver clock-in IVR
  + Care Giver clock-out IVR
  + Care Giver clock-in CC go-non-Grand Pad
  + Care Giver clock-out CC go-non-Grand Pad
  + Care Giver clock-in KP
  + Care Giver clock-out KP
  + Care Giver Go app clock In/Out
  + Care Giver Resources Leveraged
* NPS Metrics
  + Franchise NPS-Current
  + Franchise NPS-Past Period
  + NPS Change
* CG Turnover Metrics
  + Care Giver Turnover rate – Monthly
  + Care Giver Turnover rate MoM change
  + Care Giver Turnover rate – Quarterly
  + Care Giver Turnover rate QoQ change
  + Care Giver Turnover rate – Annual
  + Care Giver Turnover rate YoY change
* Companion Metrics
  + New companion Apps linked
  + Lost companion Apps linked
  + Total companion Apps linked