

Data Dictionary

UT Dallas - Qualtrics Case Competition

Account Data

Account_Mapping_Table.csv

This table will provide the mapping between Ultimate Parent and Account IDs for any mappings not in the source tables themselves

ACCOUNT_UltimateParentAccountInfo.csv

UltimateParentAccount	Primary key to tie to other data sets
Revenue	Revenue bucket company falls into. Rev bucket 1 indicate smaller revenue bucket, 7 largest
Employee	Bucket indicating the number of employees the company has. 1 is the smallest bucket
Global region	Region company is headquartered in
Industry	Industry Qualtrics has flagged account to
NAICS Code	North American Industry Classification System - 3rd party standard industry identifier. This can be parsed out to deeper levels of industry
NAICSCodeDescription	NAICS description text
FirstPurchase	When client first came into Qualtrics
HoldingCompany	Flag indicating whether or not a company is a holding company. A holding company is comprised of multiple potentially separate entities. Sales strategies may vary depending on how the HC operates

Includes Revenue, Employee Count, Region, Industry, NAICS, First Qualtrics Purchase date, and whether or not an account is a Holding Company

ACCOUNT_SpendInfo.csv

Includes the last 5 years (by quarter) of ARR and Quota Relief for each Ultimate Parent Account by Product. ARR is the annual recurring revenue - so how much the account is worth overall on an annual basis. Quota relief is the amount the account was sold (annualized so QR represents

a year of spend, e.g., a 3 year contract worth \$3M over all 3 years would have a QR of \$1M) in a particular time frame.

Account Recurring Revenue (ARR) is NOT aggregate. This is a point in time number that represents the size of the account at that point in time. You can sum the ARR by product for the same quarter to get the total size of the account. 2021 Q2 is the latest quarter provided, if an account does not have a 2021 Q2 ARR number, it can be assumed they have churned after their last reported ARR.

ACCOUNT_TAM.csv

This file contains a list of clients that have a Technical Account Manager. These are individuals that are dedicated to specific clients to help run their XM programs and handle any issues that arise

ACCOUNT_ServiceData.csv

“Services” can be provided by Qualtrics or different consulting companies to support clients with their implementation of the Qualtrics product. We work with many different services providers sometimes based on industry or speciality to serve our clients. This file contains a list of providers by account and their costing amount as well as their max amount (traditionally for the implementation). Do any of these providers drive better ongoing experiences with the Qualtrics product?

ACCOUNT_SalesData.csv

Product level sales data

Year	Year sale occurred
UltimateParentAccountID	Ultimate parent account ID
AccountID	Account ID
Product	Product line sale was associated with. RC = CoreXM, EX = Employee Experience, CX = Customer Experience, BX = Brand Experience
Forecast Stage	Whether deal was won or lost

ACCOUNT_RenewalRates.csv

This file contains renewal rates for each account and product by quarter and year. If a value is null there was nothing to renew. If a value is 0, it means the customer has churned from that product. 1 would be a straight renewal for the exact product, something greater than 1 would indicate expansion, and less than one would indicate a smaller renewal.

Experience Data

Product Satisfaction files

SENTIMENT_ProductA.csv

SENTIMENT_ProductB.csv

SENTIMENT_ProductC.csv

Three different products and clients satisfaction with those products (gathered in 2021) are included in these three files. Data is not necessarily complete and will need to be managed. This data ties to the AccountID as listed in each file.

This is data gathered from specific product touchpoints as clients interact with the Qualtrics platform.

Sentiment Data

SENTIMENT_2021NPS.csv

SENTIMENT_2020NPS.csv

Two different files (one for 2020 and one for 2021) are included. Each of these is the overall relationship Net Promoter Score (NPS) for specific Account IDs. This is a survey done once a year for clients. Clients may be included in one year but not the other depending on when the relationship started. This is a core client satisfaction metric for the company.

Configuration Data

Two files will be given (one at the Ultimate Parent level and one more detailed at the Account level). These show what key product / features are turned on for a particular account on their Qualtrics instance

CONFIGURATION_ActiveFeatures.csv

AccountID	
UPAccountID	
HasIQ	Is enabled for our IQ suite
HasXFlow	Is enabled for xFlow
HasXMD	Is enabled for XMDirectory
HasMagic3	Is enabled for three products above
HasIntegrations	Is enabled for integrations between Qualtrics and 3rd party software
IntegrationList	Integrations which client leverages

HasTicketing	Is enabled for ticketing feature
HasTextIQ	Is enabled for TextIQ product
HasStatsIQ	Is enabled for StatsIQ product
HasMaxDiff	Is enabled for MaxDiffProduct
HasDashboards	Is enabled for Dashboard product
HasConjoint	Is enabled for conjoint analysis product
HasCovidFeature	Is enabled for Covid 19 Qualtrics product
HasHealthcareWorkPulse	Is enabled for healthcare feature
HasEduFeatures	Is enabled for EDU specific features

Usage Data

USAGE_PlatformUsage.csv

UltimateParentAccountID	A company who pays for Qualtrics. aka "Account".
Account ID	Salesforce AccountID associated with the Brand and ultimate parent
BrandIDHash	An ID representing a unique instance of Qualtrics, aka a "brand". More Accounts will have 1 QualtricsID but it is possible for 1 account to have multiple brands and for brands to have multiple associated accounts.
Date	Month when the Activity took place
SessionCount_Amp	Number of sessions across all users in the brand. A session is defined as usage separate by 30+ minutes of inactivity.
ResponseCount	Number of responses received
ActionCount_ProjectsCreated	Number of projects created.
MUserCount_ProjectsCreated	Number of users creating projects.
Pageland_Count	Number of pagelands across all users in the brand. A pageland event occurs whenever a unique url is loaded.
AMRActions_UniqueUsers	Number of unique "AMR users" active in the brand. AMR users are users who use more advanced features in the product, such as TextIQ or block randomization.
TextIqConsumption_Events	Number of events related to TextIQ. Events can be everything from pagelands to clicks on certain buttons.
TextIqConsumption_Uniques	Number of unique users performing TextIQ events.

Marketing Data

MARKETING_WeeklyAccountBehavioralAgg.csv

SFDCAccountID	AccountID which can be tied to shown account structure
WeekDateID	Week activity occurred
Namespace	Metric type / categorization <ul style="list-style-type: none">• <i>ProfileScore</i>: Applicable for intent score only• <i>KeywordIntent</i>: Search based on keywords used• <i>WebVisits</i>: Website metrics based on visits / clicks
MetricName	<ul style="list-style-type: none">• <i>Intent_Score_Avg</i>• <i>BX</i>: Total number of searches for BX keywords• <i>Competitor CX/RC</i>: Total number of searches for specific RC/CX competitors• <i>Competitor EX</i>: Total number of searches for specific EX competitors• <i>CoreXM</i>• <i>CX</i>: Total number of searches for CX keywords (Customer, CSAT, NPS)• <i>EX</i>: Total number of searches for EX keywords (Employee, 360)• <i>Experience</i>• <i>Qualtrics</i>: Total number of searches for Qualtrics• <i>Total_Brande</i>d: Total number of branded keywords searched (e.g., Qualtrics)• <i>Total_Generic</i>: Total number of generic keywords searched (e.g., branding, customer insight)• <i>Click</i>: Total number of clicks on Q website on the account level• <i>CoreXM_WebVisits</i>: Total number of webpage visits on CoreXM pages on the account level• <i>CX_WebVisits</i>: Total number of webpage visits on CX pages on the account level• <i>EX_WebVisits</i>: Total number of webpage visits on EX pages on the account level

	<ul style="list-style-type: none"> • <i>HomePage_Visits</i>: Total number of Qualtrics home page visits on the account level • <i>Page_Load</i> • <i>Play</i> • <i>SpecificPage_Visits</i>: Total number of non-support page visits on the account level
MetricValue	Value of metric

MARKETING_Account_PersonLevelBehavioralAgg.csv

This table contains information at a per person level based on marketing interactions. These leads can be tied to the AccountID shown to join the person to their associated account.

LeadID	ID for activity shown
CountWPVisits	Number of webpages visited in the last 90 days
CountFormFills	Number of form fills in the last 90 days
CountLinkClicks	Number of link clicks in the last 90 days
CountEmailOpens	Number of emails opened in the last 90 days
AccountID	Id for account lead is associated with
MLAccountID	Same as above
CountWPVisits_A	Number of webpages visited in the last 90 days by all contacts from the associated account
CountFormFills_A	Number of form fills in the last 90 days by all contacts from the associated account
CountLinkClicks_A	Number of link clicks in the last 90 days by all contacts from the associated account
CountEmailOpens_A	Number of emails opened in the last 90 days by all contacts from the associated account
CountPeopleWPVisits_A	Number of unique people visiting webpages in the last 90 days
CountPeopleFormFills_A	Number of unique people filling out forms in the last 90 days

CountPeopleLinkClicks_A	Number of unique people clicking links in the last 90 days
CountPeopleEmailOpens_A	Number of unique people opening emails
Contact_Score Account_Score	Individual contact score Account level score
PersonScore	Total score including both account/person level

Operations Data

OPERATIONAL_SuportData.csv

Year	Year ticket(s) were created
AccountID	
UltimateParent Account ID	
TicketType	Type of support ticket (SE = email, SP = phone, CS = online chat)
NumTickets	Number of support tickets opened by method for account
Avg(CSAT)	If non-null, average CSAT score provided by client for support tickets (not all reps will provide CSAT data after support ticket)
NumTicketsWithCSAT	Number of support tickets where a client provided a CSAT score
AvgTicketLength	Average length a ticket was opened from creation to close. In seconds
Avg(FirstEmailTaskDuration)	Only for email support tickets. Time it took from receiving an email till a rep first responded. In seconds
Avg(NumberOfEmails)	Only for email support tickets, average number of emails in the exchange it took to resolve an issue