



Monthly Engagement Report

Geezeo posts a monthly Engagement Report within your Geezeo Admin Site on the Dashboard page under Reports & Documents.

This report is cumulative and updated with the most current data on the second business day of each month. The new report replaces the old, and no previous versions are saved. Each report includes the following*:

firstname	payoff_goals	ext_investment	int_checking
lastname	long_term_goals	ext_loan	int_home
email	savings_goal	ext_savings	int_investment
creatdat	ext_asset	ext_student_loans	int_loan
lastlogin	ext_autos	ext_total	int_savings
login_count	ext_bill	int_asset	int_student_loans
partner_customer_id	ext_cards	int_autos	int_total
budgets	ext_checking	int_bill	networth_accounts
alerts	ext_home	int_cards	cashflow_items

* Not all data is available, depending on online banking partner.

Engagement Report Key:

email	Address within online banking	savings_goals	# of savings goals
createdat	Date PFM was first accessed	ext_	# of external accounts of a certain type
login_count	Count starts at 0	ext_total	Total # of external accounts synced
partner_customer_id	Unique identifier sent from online banking	int_	# of internal accounts of a certain type
budgets	# of spending targets	int_total	Total # of internal accounts synced
alerts	# of alerts	networth_accounts	# of net worth items manually added
payoff_goals	# of debt reduction goals	cashflow_items	# of items added to cash flow
long_term_goals	# of life style goals (i.e. retirement)		

User Engagement

On a monthly basis, we recommend using this data to create segmented lists for Engagement Emails. Suggested segments include:

Active Users

Users who have logged into the platform in the last 90 days or those who have created alerts.

1. Sort data by “lastlogin”
2. Cut and paste the users who have not logged in within a three month time period to a new sheet, Sheet B.
3. Sort Sheet B by “alerts”
4. Cut and paste the users who have a value of “1” or higher from Sheet B back to Sheet A.

Users with Aggregated Accounts

Users who have synced any type of external account to the platform.

1. Sort data by “ext_total”
2. Remove all users from this list with a blank value.

Users with Payoff Goals

Users who have created a debt reduction goal within the platform.

1. Sort data by “payoff_goals”
2. Remove all users with a blank value
3. Optional: Log into your Geezeo Admin site and run a Marketing Campaign Report to find users with a specific type of goal (i.e. To pay off a credit card)

Engagement Insights

You can also gain insights into the level of engagement you are developing by aggregating data in the monthly report. For example you can create use the report to track over time:

1. Total # of users
2. Total # of Aggregated Accounts
3. Average # of Aggregated Account per User
4. Total # of Alerts/Budgets/Cashflow Items
5. Average # of Alerts/Budgets/Cashflow Items
6. Total # of Goals
7. Total # of Goals per User
8. Average # of Goals per User

If you need any help,
contact your Client Success Manager

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