DLA Customer Analysis Report & Engagement Summary

Instructions: Complete and submit request. All fields bordered in red are manditory, and dates entered must be YYYY-MM-DD formatted.

For assistance in filling out a CRM Analytics Request, please send an Email to CRMAnalyitcs@dla.mil and an analyst will contact you.

Date of Request:		Request by Date:	

REQUESTER INFORMATION

First Name:		Last Name:	
Title:		Grade/Rank:	
Organization:			
Phone:		Email:	

REQUESTER'S ROLE: *Select the box which best represents your role.*

- ☐ DLA Senior Leader
- ☐ Warfighter Support Representative (WSR) / Customer Support Representative (CSR)
- ☐ Customer Facing Personnel
- ☐ Other (explain): _____

TYPE OF REPORT

☐	PDF	This type of report is formal in nature and generally used in high level overviews. Delivered as a PDF it will include: cover sheet, a brief explanation of the analytic findings, geospatial maps identifying customer locations, the time frame the data covered, charts, tables, a glossary of terms, and DLA course of instruction that could be useful to the units identified in the report. This report does not allow for the recipient to cut and paste data elements and is intended to be a stand-alone report.
☐	Spreadsheet	This type of report is generally used by a forward-facing customer advocate/trainer. It is delivered in the form of an Microsoft Excel spreadsheet and will include (but is not limited to); a glossary of terms; analytics; top 10-20 DODAAC's using the CIC; top reasons units are contacting the CIC; most common NSNs; individual user POC Name, Email and phone number (when available), broken out by reasons for contact; and DLA tailored instruction that could be useful to the units identified in the report. Charts and graphs are able to be cut and pasted into different presentation media by the recipient of the report.
☐	PowerPoint	This type of report is delivered in the form of a Microsoft Power Point (PPT) presentation and will be created using the standard DLA PPT presentation formats. The report elements will consist of those found in the PDF and/or spreadsheet reports listed above; bar charts, graphs, pie charts, maps and tables with trend analysis when practical.
☐	Other	Possible examples: - A report that would include a request for a specific geographic location, POC and contact information for a special training event where the person setting up the event needs a list of individuals to invite to the course. - When a DLA official is planning to visit a specific location and wants to be aware of potential key pain points for the units located at the installation being visited.

REPORTING PERIOD TIME FRAME

Start of Reporting Period:		End of Reporting Period:	

How often would you like to receive the report?

- ☐ One-time
- ☐ Monthly
- ☐ Quarterly
- ☐ Semi-annually
- ☐ Annually
- ☐ Other (Please explain):