RELEASE NOTES

CX Suite 17.2 Release

AUGUST 2017

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RELEASE OVERVIEW

The **CX Suite 17.2 Release** is ForeSee's biggest rollout since the launch of **CX Suite**. The most extensive change is that of **Feedback**, with many new features and a redesigned workflow. In addition to this, we are introducing two new dashboards and major enhancements to managing hierarchy. Here is a summary of this release:

- **FEEDBACK** – The workflow for creating a new survey project has been reduced to a three-step process with a redesigned top ribbon. Adding a new topic is now an in-line process and there is a new **Short Text** component designed to accept email addresses or phone/text numbers for direct connection with respondents.

  The new **Collection Methods** page offers settings for the new **Web Link** and existing **Site Popup** options. You can also set a different badge configuration for each device type, and choose to hide the badge on a specific device.

  Additional enhancements include **Multiple Site Keys**, **Replay Processing Status**, the administration of **User Roles and Permissions**, and data feed into **Text Analytics**.

- **LEADERBOARD** – The new **Leaderboard** dashboard gives you a quick look at the five highest and five lowest scoring levels of your hierarchy structure. Drill into the full **Leaderboard** view to create a customize view of key survey data. Add and remove columns, as well as, arrange and sort by columns to customize the perfect view. Then, save this view for future visits. Another key feature is the persistent, clickable hierarchy-level breadcrumb so you always know where you are in the organizational structure and can jump back to a specific level.

- **SURVEY INVITATION AND COLLECTION** – A **Single Text Box** is now available for **CX Survey** to allow respondents to provide feedback that may not be captured otherwise. You can also exclude selected pages of your web site from offering a survey invitation. You now have the option to display a different badge configuration for each device type.

  The **Surveys** tab now offers additional filtering options and a **My Favorites** page listing your selected projects. With the new **Multiple Site Keys** option and improved survey templates, you now have greater control of how and where your surveys are deployed.

- **TEXT ANALYTICS** – The new **Topics** dashboard gives you a quick view of sentiment trends. **Settings** has been moved to **Global Settings > Apps** to manage data feeds from **Feedback**, **CX Survey**, and now Comma Separated Values (CSV) files, which means you can process data from other sources, like social media.

- **CX SUITE** – We have significantly enhanced the management of hierarchies by adding multiple hierarchy capabilities and the option to upload CSV files of your hierarchy versions.

  The **See Respondents** page has several new features designed to help you customize the page and filter the data to your needs.

FEEDBACK

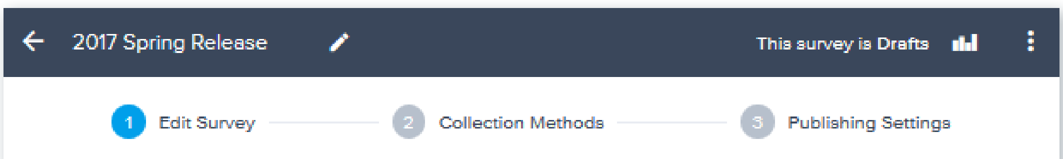
MULTIPLE SITE KEYS

For clients with more than one web site, there's now the ability to create and manage **Feedback** surveys on multiple site keys, with a descriptive name to each site key to easily identify it with the corresponding web site. You can also clone an existing Feedback survey to a different site key, instead of duplicating the existing survey and having to manage another survey.

SURVEY CREATION, CONFIGURATION, AND PUBLISHING

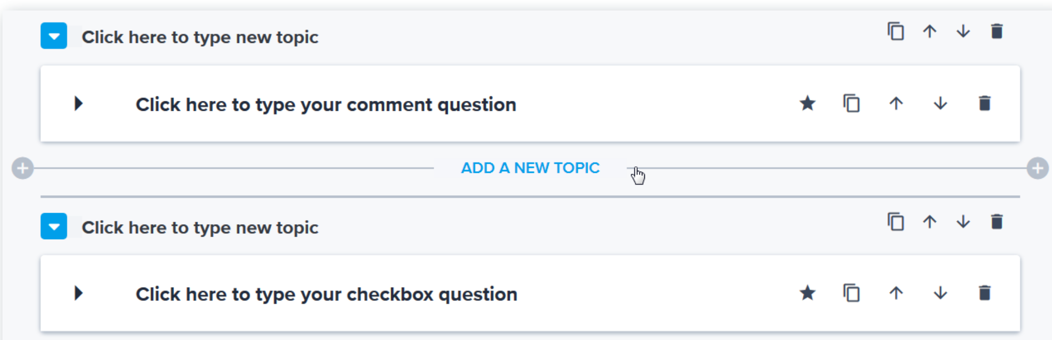
The process of creating, configuring, and publishing **Feedback** surveys has been redesigned and enhanced with several new features. Starting with the process itself, the previously four-step process has been condensed into, **Edit Survey**, **Collection Methods**, and **Publishing Settings**.

The top ribbon now offers a back button that returns to the previously viewed page, an edit feature ( ) to change the survey name, survey status, link to the **Analyze Survey** page ( ), a mechanism for publishing the survey to production, and a menu of even more features. The bottom of the page offers a **Next** and **Previous** page option to move from one step in the process to another.

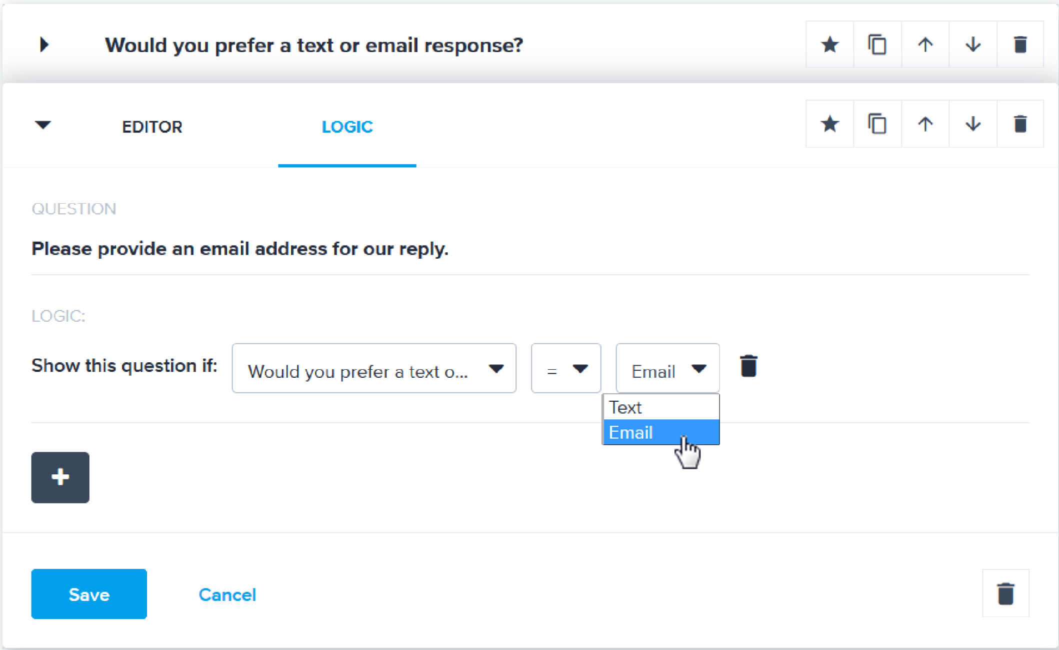


Creating and Editing Surveys

The **Add a New Topic** feature has been moved to the layout portion of the page to provide an in-line experience while building a new survey.



A **Short Text** input field has been added to the menu of survey components for collecting email addresses or phone/text numbers to respond to a customer's question or concern. You can also apply logic to the feature so that the **Short Text** input field only displays when a specific answer choice is selected.



Collection Methods

The **Collection Methods** page is a completely new layout to support your Customer Satisfaction program. The **Web Link** option allows you to add a hyperlink to your web page, email, or social media page for launching the survey from any of these environments. The **Site Badge** option features a customizable badge that visitors click or touch to display the **Feedback** survey. Click the **Edit** icon ( ) to access the following controls:

WEB LINK

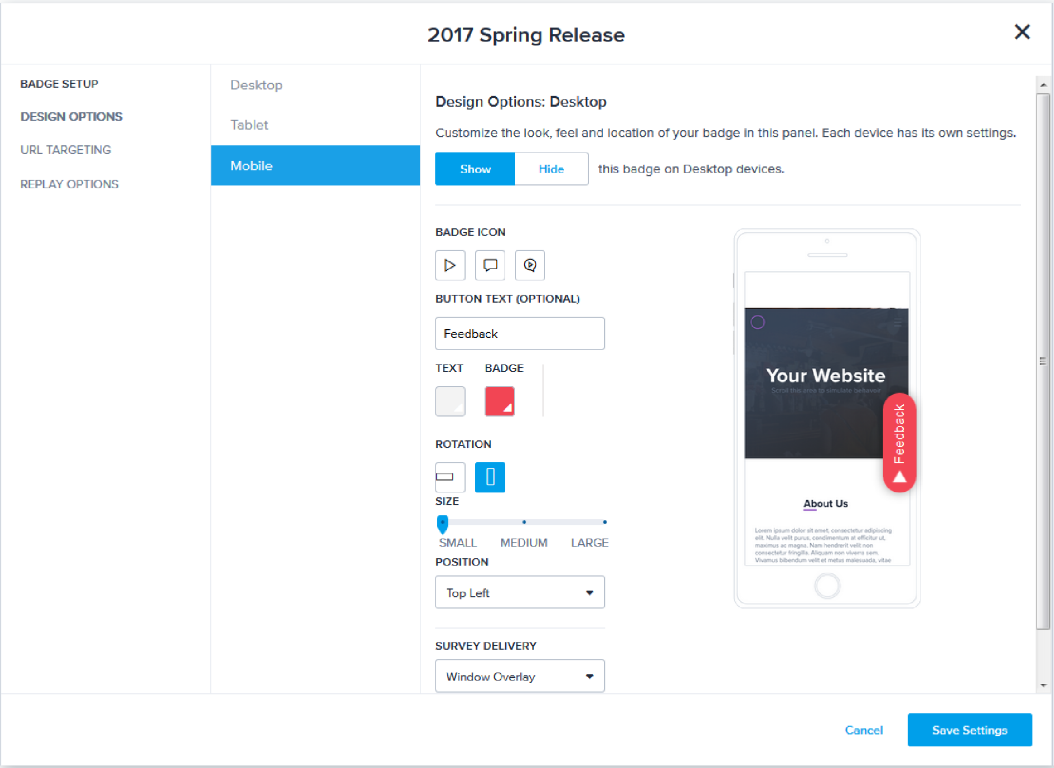
Business Managers may now create surveys with **Web Link** and start collecting customer feedback quickly to minimize the need for technical support. You can build a survey on the **Edit Survey** page, then go straight to **Publishing Settings**, where you'll find a Web Link Uniform Resource Locator (URL) for **Staging** and **Production**. Copy this URL and paste it in an email, Social Media page, or text message. The survey is hosted by ForeSee, so there is no need for a web page for the survey to pop up from. You can set an expiration date for the link on the **Collection Methods** page.

SITE BADGE

New site badge configurations now provide increased badge design options and enhanced URL targeting across different devices. These new configuration options include:

New Design Options:

- Showing/Hiding the site badge by device type
- New site badge icons
- The ability to change the color of the site badge text
- Three choices for site badge size for different devices



URL TARGETING

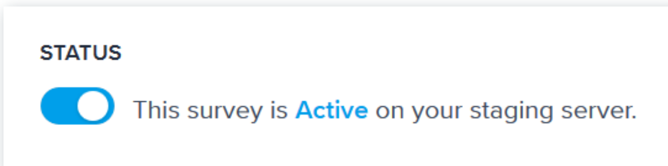
You can now specify URL include and exclude rules at both the overall survey level as well as the individual topic level, offering you the ultimate flexibility to dictate which pages the badge appears on as well as on which pages topics are selectable by your visitors.

Enhanced Feedback Publishing

To streamline the overall publishing process, we've eliminated the need to manually publish changes to a staging environment. Now, any change you make in the **Edit Survey** or the **Collection Methods** screens are automatically published to staging as soon as that change takes place.

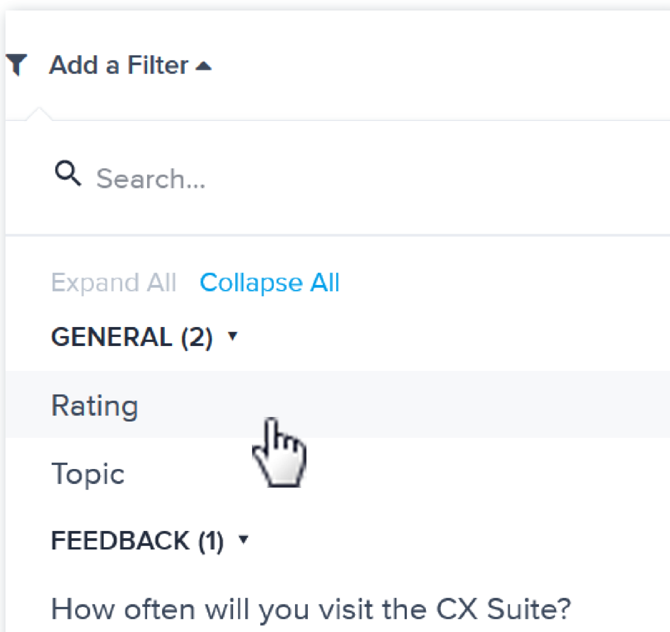
We've also built in the ability to publish changes to production no matter where you are in the survey build/edit/configure process. The mechanism to publish to production now sits in the header on the **Edit Survey**, **Collection Methods**, and **Publishing** settings screen, thus eliminating the need to go to a specific screen to publish your changes to production.

The **Publishing Settings** page also has a new look with status settings for both staging and production. With these status settings, we've eliminated the need to publish to both staging and production after setting a specific survey to either active or inactive before the changes take place. Now, simply toggling the survey status to either active or inactive automatically changes the survey's status depending on the environment you've chosen.



FEEDBACK FILTERING

Our goal is to create a consistent user interface experience across all **CX Suite** applications. Subsequently, we have implemented the center/top filter menu, controls, and criteria drawer in **Feedback**. You can create a filter by clicking a menu item, such as **Rating**, and selecting the desired answer options. This new filtering menu, control, and criteria drawer responds to click filtering as well.



FEEDBACK RESPONSE MASKING

Text entries having a Social Security Number or credit card number format are now masked and appear as **X**s.

REPLAY FOR FEEDBACK

Processing Status

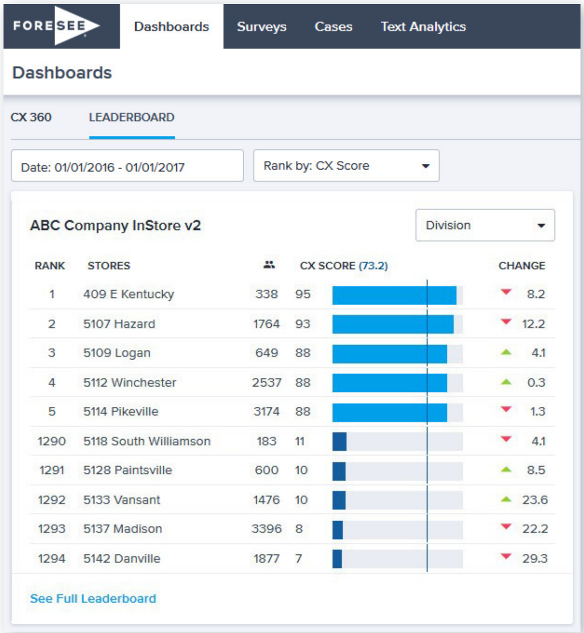
When a **Replay** for **Feedback** recording is processed, the progress is now displayed to inform you the recording is not yet ready for viewing.

DASHBOARDS

Leaderboard

The **Leaderboard** has been added to the **CX Suite Dashboards**. This new dashboard template provides ranking and performance data across the entire organization.

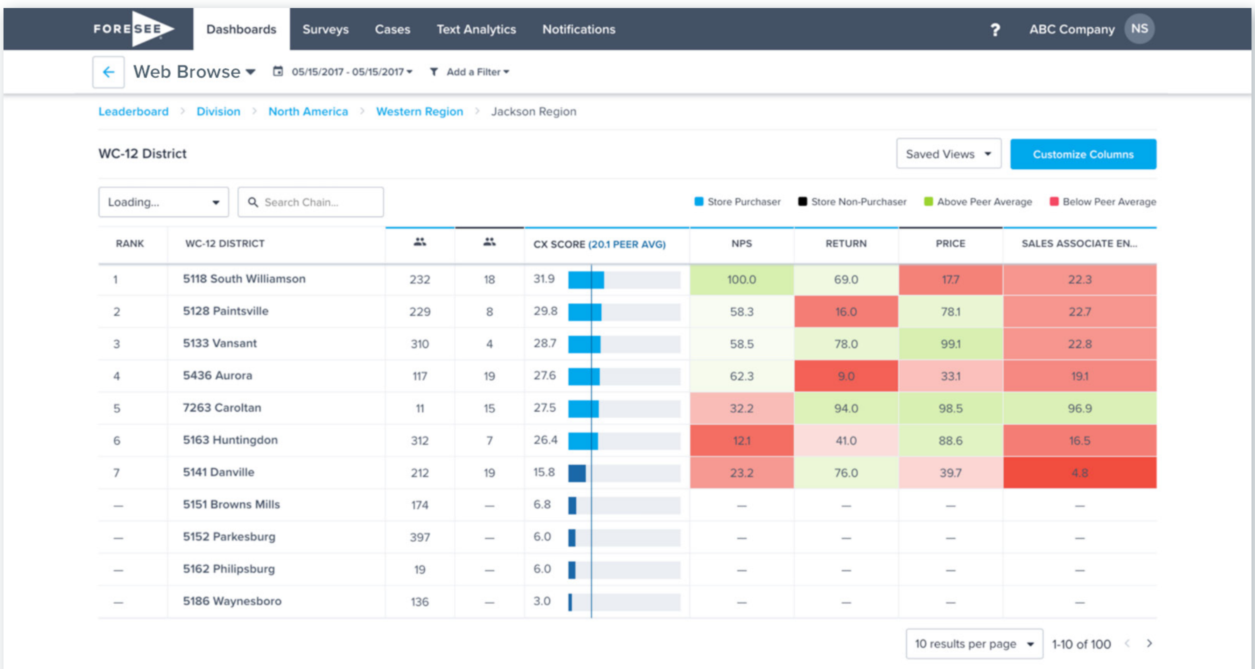
- Support for a variety of departments within an organization:
  - Leadership
  - Consumer Insights
  - Operations
- Instantly view of the organization's:
  - Top five and bottom five performers and click each one to drill down into the Customer Experience data.
  - CX or NPS score and how it is trending over time.
  - Peer averages
- Additional controls are available, such as:
  - Date selector to filter data for a specific date range.
  - A rank by metric selector for either CX Score or NPS.
  - A hierarchy drop down menu to support the top/bottom five rankings sorted by various levels within the organization.
- A full **Leaderboard** view that can be used for comparisons. This new dashboard can be customized to include key survey response components.



CUSTOM VIEWS

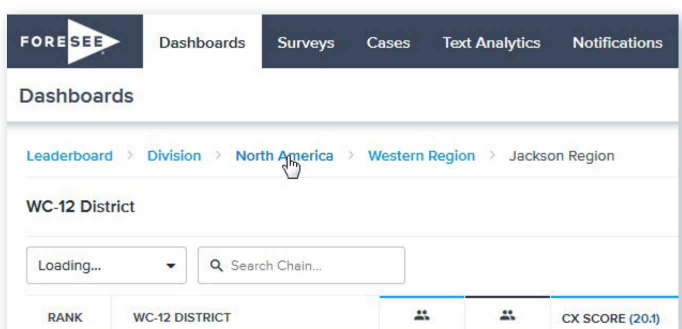
The full **Leaderboard** view offers a great comparative perspective with customizable columns. Here are the key features of this dashboard:

- Add important survey response components to the full **Leaderboard** view.
- Drag-and-drop the columns into a preferred order.
- Remove unwanted columns.
- Set the number of results displayed on each page.
- Save a customized view within the **Saved View** menu for repeated use.
- Manage custom views by either renaming or deleting them.



HIERARCHY VIEW

The hierarchy breadcrumb allows you to go back to view a previous level and identifies where you are in the organizational structure. Each level of the breadcrumb is linked and renders the data from that specific level.



SURVEY / INVITATION / COLLECTION

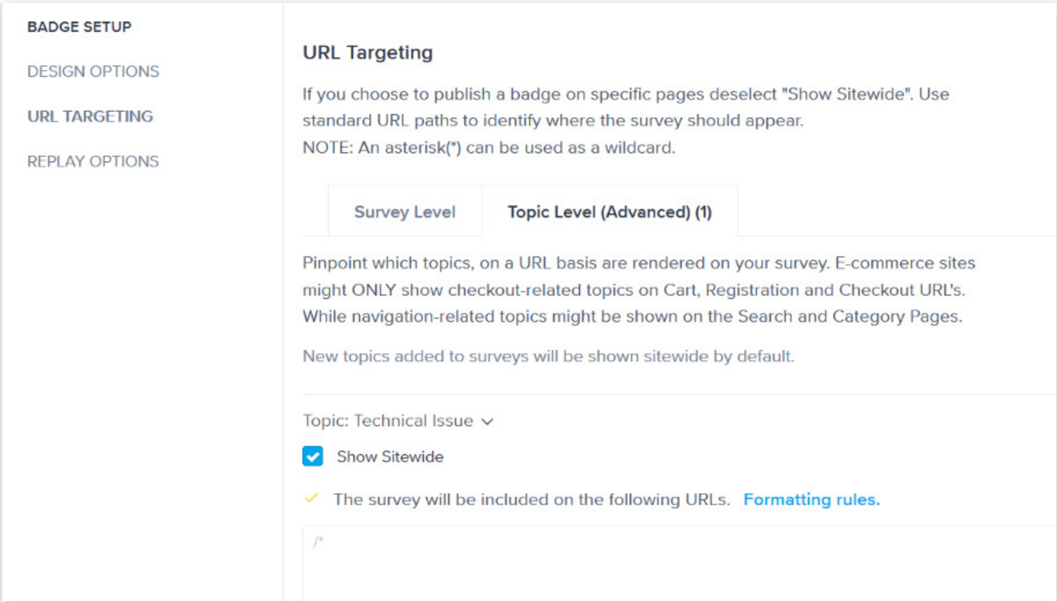
CX SURVEY DESKTOP AND MOBILE

Single Text Box

A freeform text box can now be added to your surveys to offer respondents the opportunity to provide additional feedback that may not be captured by any survey questions. This text box may also be used to collect contact information from the respondent who might request a response from your organization.

Include/Exclude

Manage which pages of your web site offer a survey or survey topic. By default, a survey and all of its topics are set to appear site-wide. However, you may now set which site pages offer the survey, and which topics are available on those pages. In addition to these settings, you can select to have a notification sent to you to confirm the survey is live on the pages you selected.

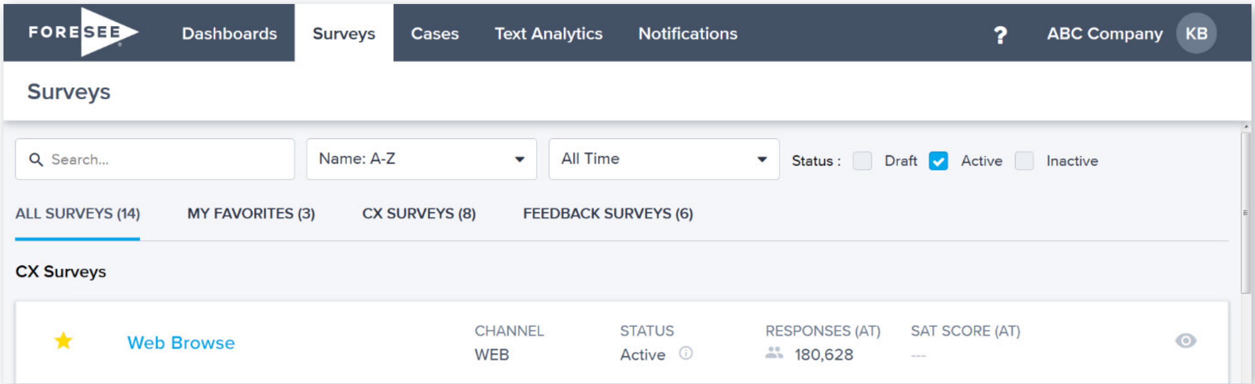


Device-Specific Badge

Customize the **Survey Launch Badge** to each device your survey is available on. You now have the ability to turn the badge on or off for each device type, e.g., desktop, tablet, or phone, and select the size of the badge for each device in addition to the existing settings for color, position, and scrolling behavior.

Survey Project Center

There are a number of new features to the **Surveys** tab in this release, such as **Date Range Filtering**, a **My Favorites** page, and **Status Filtering**.



DATE RANGE FILTERING

Menus have been added to the **Surveys** tab which allow you to limit **Response** counts and **Satisfaction Scores** to the past 24 hours, seven days, or 30 days.

MY FAVORITES

Surveys may now be tagged as a **Favorite** so you can focus on the surveys most important to you. Tagged surveys are indicated on the **All Surveys** page and display on the **My Favorites** page.

STATUS FILTERING

The status of your surveys can now be used as filter criteria so you can view surveys that are only in **Draft**, **Active**, or **Inactive** status. By default, only **Draft** and **Active** surveys are displayed.

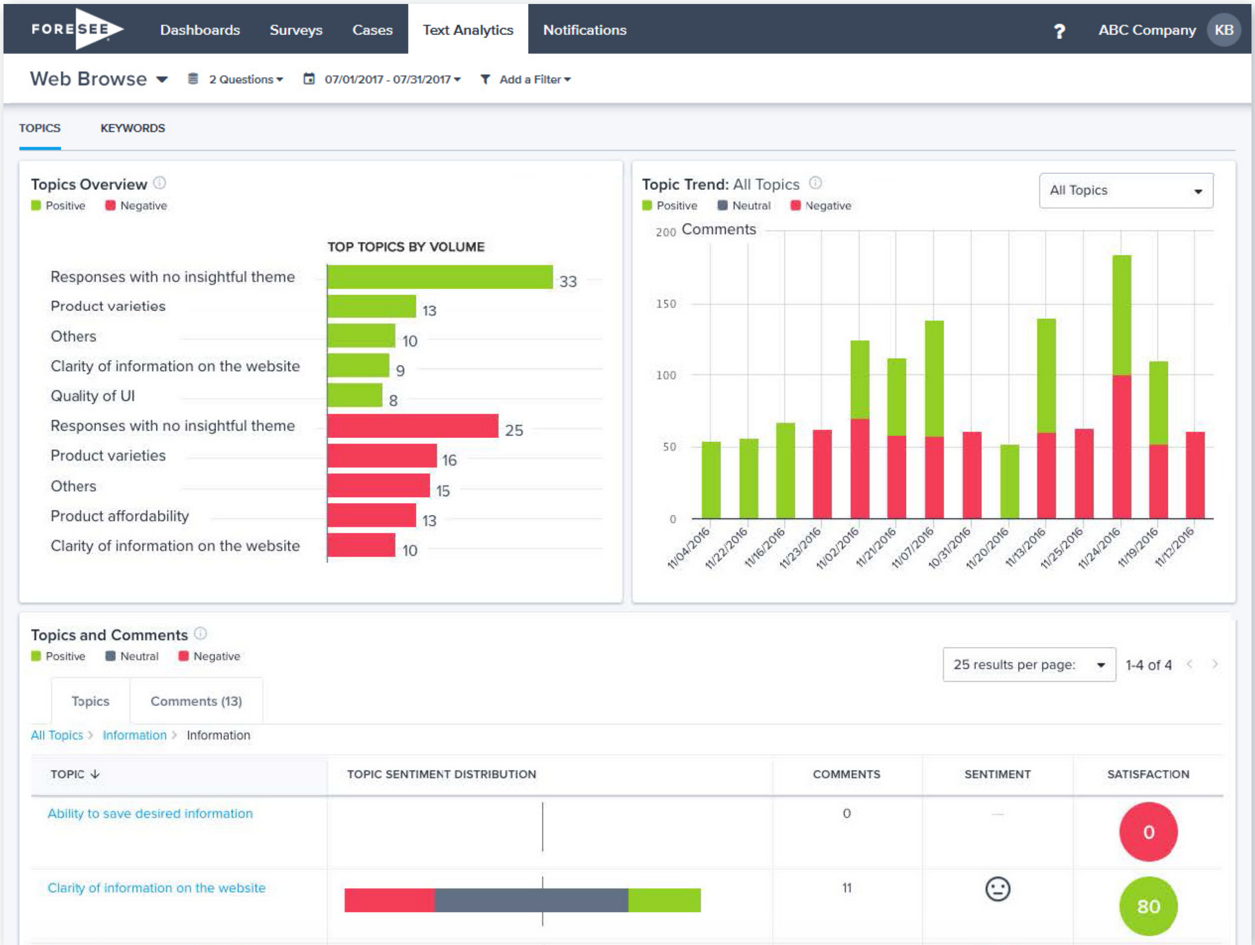
Improved Survey Templates

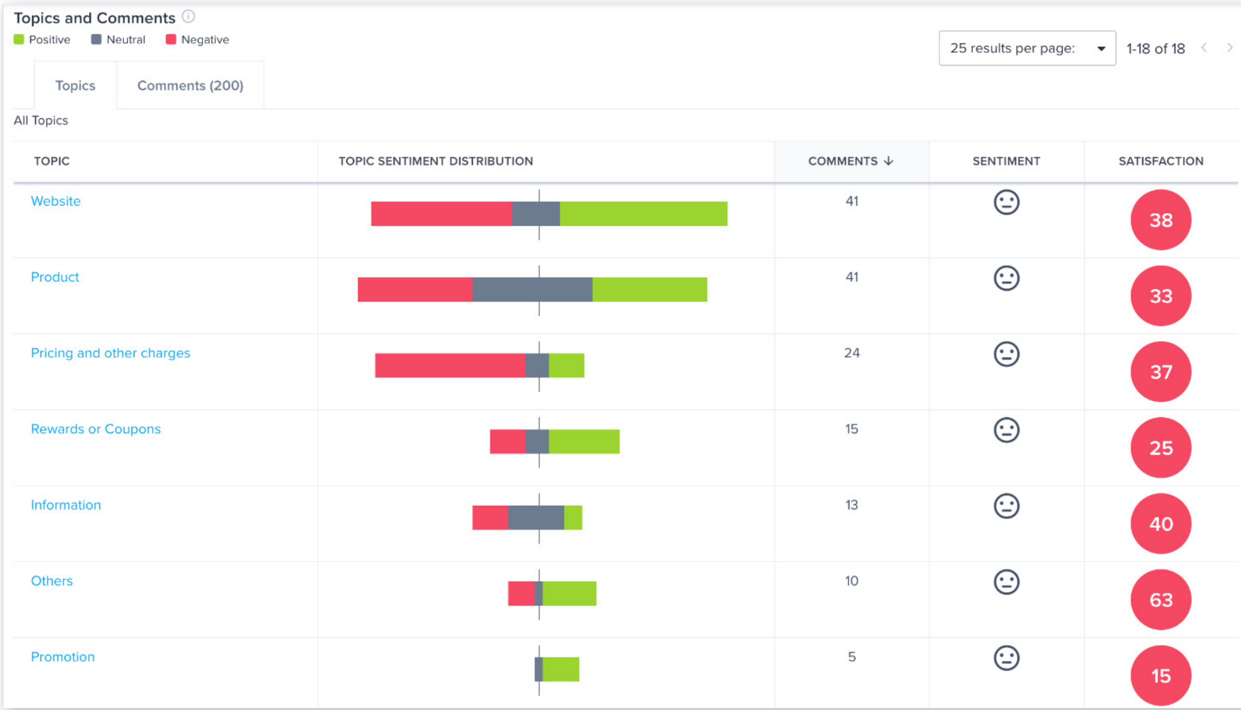
With this release, clients with multiple site keys can now design a survey for each site key and lock the design to prevent other users from performing unauthorized revisions. These clients may also have multiple templates for various devices, locations, brands, etc. Each template may have custom logos and be configured to match your brand colors.

TEXT ANALYTICS

TOPICS DASHBOARD

You may now view your **Text Analytics** data by **Topic** and **Keyword**. The new **Topics Dashboard** presents the sentiment trend for your top topics, allowing you to easily identify how positive and negative topics are impacting your score. Topics are curated based on pre-built taxonomies for the following industry verticals; Retail, Financial Services, Government and General. The **Topics** tab consists of an **Overview** card with top performer topics listed first, a bar chart showing trend for the selected date range, and a **Topics** and **Comments** card listing your topics with **Sentiment Distribution**, a count and tread line of **Comments**, overall **Sentiment** and tread line, and the topic's **Satisfaction** score.





DATA FEED MANAGER

Settings

The **Settings** tab, which contains the **Data Feed Manager**, has been moved to **Global Settings**, which is available from the **User** menu. In **Global Settings**, click the **Apps** tab to access the **Data Feed Manager**, and select the desired **Text Analytics** data feed option.

Custom Data Feeds

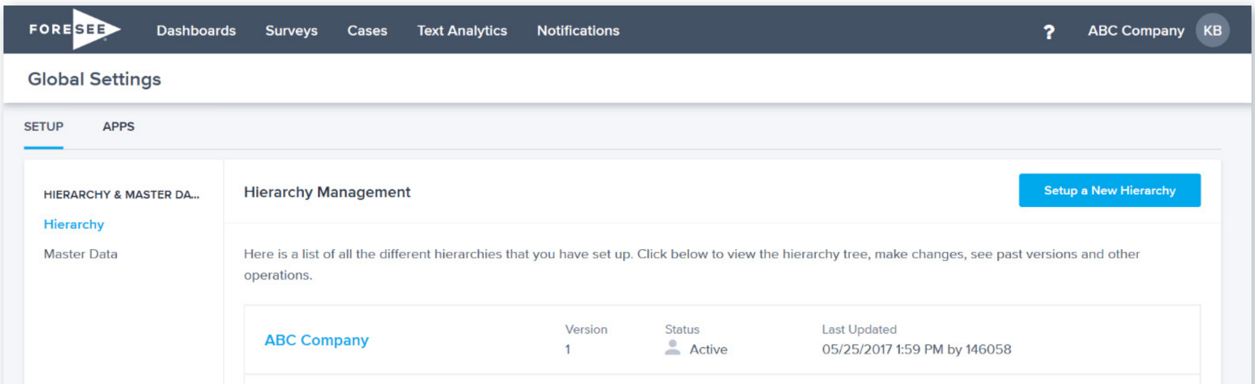
You may now upload a Comma Separated Values (CSV) file or connect to our **Text Analytics** endpoint (API) from an outside source, such as social media, and use **Text Analytics** processing to convert this data into powerful reports.

CX SUITE PLATFORM

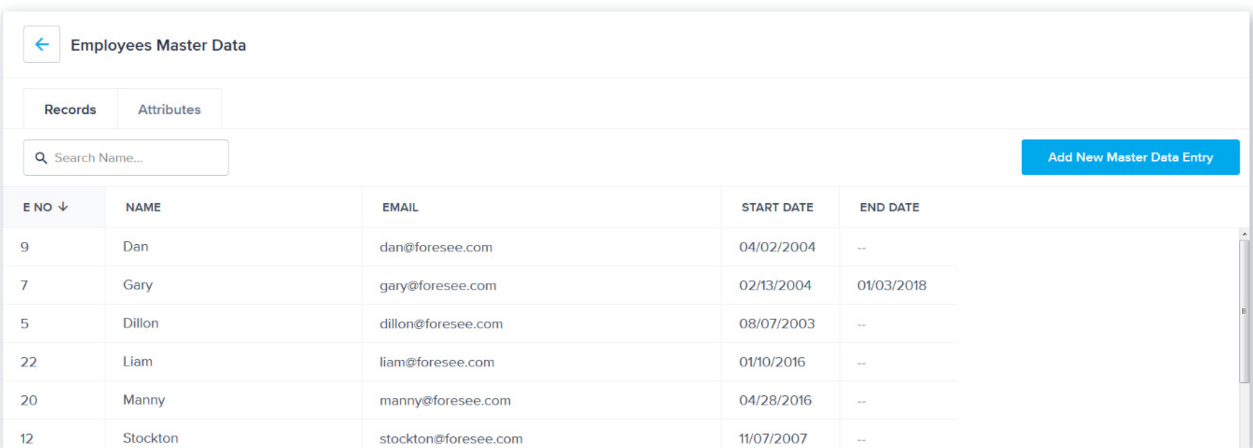
HIERARCHY

Hierarchy Management

Global Settings has been expanded to provide the ability to create and manage multiple hierarchy types (e.g. Location, Agents, and Employee) on the **Setup** tab. The **Hierarchy Definition**, which consists of its members, is uploaded from a Comma Separated Values (CSV) file. You can also upload a CSV for each new hierarchy version.



The **Master Data** page allows you to manage the members of the various hierarchies as well as the member attributes in the same way, either manually (for changes to existing members) or by uploading a CSV file (adding new members). The **Search** feature allows you to input the name or identifier of a specific member.



Additionally, each hierarchy version has the following features and functionality:

- Can be associated to a **CX Suite** product, such as a hierarchy-enabled **CX Measure** or **Case Management**.
- Able to maintain a **Draft** or **Pending Uploads** version prior to publishing a hierarchy.
- Can create roles to control how each level of your hierarchy is viewed by members of your organization.

Hierarchy Permissions

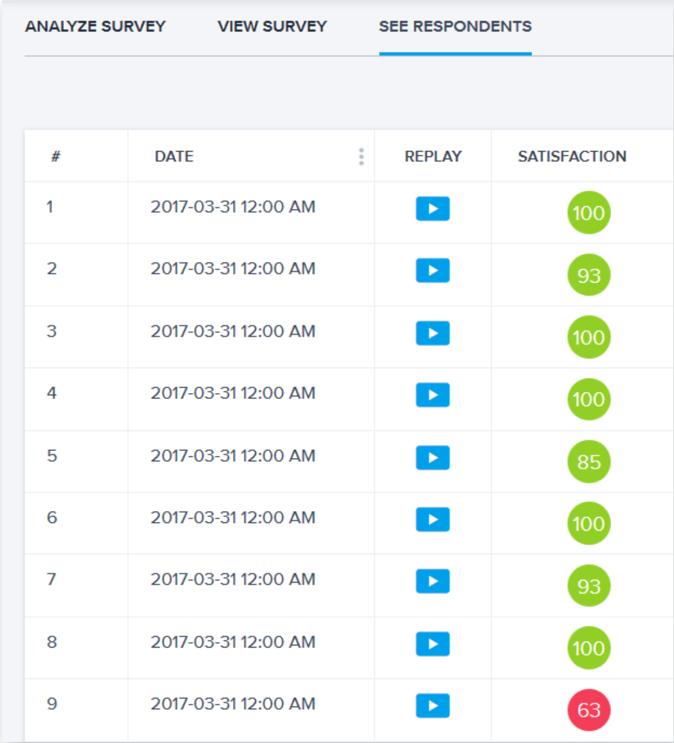
Several new features have been added to administrating **User Permissions** for hierarchy:

- A table consisting of all users within your organization, along with general information on each user, is now available. Click on a user's name to display detailed data on the user.
- Create **User Roles** which can be assigned to existing users dynamically based off an active hierarchy.
- **Save As** functionality has been added to enable you to create a user role based on the modified permissions of a single user.
- Tailor **User Permissions** down to individual users.

SEE RESPONDENT

The **See Respondent** page has been enhanced with improved usability and customization features to accommodate your business objectives. By default, you see the date of the response, either the **CX Measure Satisfaction Score** or **Feedback** star rating, and the last open ended question of the survey. For **Replay** clients, you also see the Replay video icon for recorded sessions. Here are some of the customizations you can make with the new **See Respondents** page:

- Using the **Customize Columns** feature, you can add respondent survey components that are most important to you, such as:
  - Open ends (e.g., suggestions for improvement or difficulty w/ navigation)
  - Key questions (e.g., visit frequency, primary reason for visit, task accomplishment, or demographics).
  - **CX Survey** model scores (Elements, Satisfaction & Future Behaviors).
  - Key user details (e.g., Browser, OS, Screen width, Referral URL, or Rewards Member).
- Sort by date, CX scores or **Feedback** ratings (ascending and descending).
- Adjust columns to the width you desire.
- Drag and drop columns to your preferred arrangement.
- Remove columns you may not care to see.
- Save, edit, or delete your custom view(s).
- Set a default custom view.



#	DATE	REPLAY	SATISFACTION
1	2017-03-31 12:00 AM		100
2	2017-03-31 12:00 AM		93
3	2017-03-31 12:00 AM		100
4	2017-03-31 12:00 AM		100
5	2017-03-31 12:00 AM		85
6	2017-03-31 12:00 AM		100
7	2017-03-31 12:00 AM		93
8	2017-03-31 12:00 AM		100
9	2017-03-31 12:00 AM		63

Click or tap to drill into a specific respondent and see more details, such as watching a respondent's **Replay** video, reviewing **CX Survey** model scores, **Feedback** rating and topic, full survey responses, and user details (such as browser, referral URL, device, operating system, etc.).

- Engage with the new left column navigational links, which allow you to quickly navigate to different sections. Select either **Replay**, **Scores**, **Custom Questions**, **Open Ended Questions**, **Model Questions**, **User Details** to view the respective area.
- To continue in this view and see more respondent details, we have implemented a forward/backward scroll feature. Hover over the left or right side of the screen to display the scroll controls and move from one respondent to the next respondent, or go to the previous respondent.

PAGE FILTERING

Replay clients now have the ability to filter off one or more pages of their site. This helps to isolate key pages containing videos of the customer experience that you want to watch. These page filters can contain more than one type of filter parameter and include:

- Entry Page: the first page visited in a session (e.g. homepage).
- Page: a specific page visited during the session (e.g. product landing page).
- Exit Page: the last page visited during a session (e.g. checkout).

SENTIMENT ANALYTICS

Sentiment Analytics is being replaced by **Text Analytics** as of this release. You no longer have access to this feature through **Advanced Analytics Portal**, but you may log into **CX Suite** and click the **Text Analytics** tab for your analysis.

DATA ATTRIBUTES

You can now add **Data Attributes** to track the Customer Journey down to Touchpoints.

BENCHMARK

As of April 1, all **Benchmark** category names have been revised to provide a more descriptive label and include the channel type. This change does not affect how each category is structured, i.e., who is in the category.

The following are some examples of the current names and the new one:

CURRENT NAME	NEW NAME
Mobile Site Sporting, Outdoor and Fitness	Sporting, Outdoor and Fitness (Retail) - Phone Site
Mobile Sporting, Outdoor and Fitness	Sporting, Outdoor and Fitness (Manufacturers) - Phone/Tablet Sites and Apps
Mobile Sporting, Outdoor and Fitness	Sporting, Outdoor and Fitness (Retail) - Phone/Tablet Sites and Apps
Sporting Goods and Outdoor Stores	Sporting Goods and Outdoor - Store Purchase
Sporting, Outdoor and Fitness	Sporting, Outdoor and Fitness (Manufacturers) - Desktop
Sporting, Outdoor and Fitness	Sporting, Outdoor and Fitness (Retail) - Desktop
Sporting, Outdoor and Fitness (Canada)	Sporting, Outdoor and Fitness (Retail) - Desktop, Canada
Tablet Site Sporting, Outdoor and Fitness	Sporting, Outdoor and Fitness (Retail) - Tablet Site

The **Benchmark Category** name updates do not effect who is in those categories or what those categories include. What once showed up in the benchmark list as "Sporting Goods and Outdoor Stores" is now "Sporting Goods and Outdoor - Store Purchase", but the functionality and saved benchmark categories continue to work as before.

In short, all product features using benchmarks continue to work the same with the updated names and descriptions. Saved benchmark assignments remain saved but now show the updated name. From a user perspective, the only change is a more descriptive name and some definitions for the benchmark category.

TEALEAF INTEGRATION

Tealeaf movies are no longer supported. However, data such as **Tealeaf ID** and **TLSessionID** will continue to be supported and available in both the **Respondent Details** page of **CX Suite** and the **ForeSee API**.

ABOUT FORESEE

ForeSee is the pioneering leader in Voice of Customer (VOC) solutions. Armed with the ForeSee CX Suite, more than 2,000 companies worldwide have transformed their VOC programs into a strategic and rigorous business discipline that delivers economic impact across all channels and touchpoints.

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