RELEASE NOTES

Overview: Introducing ForeSee CX Suite

FALL 2016

CONTENTS

SUMMARY

This fall, we're excited to introduce ForeSee CX Suite – everything about ForeSee you already know and trust, in one suite of applications.

With ForeSee CX Suite, you'll enjoy an enhanced user experience that's intuitive and easy to navigate, as well as new filtering capabilities and downloadable reports.

You'll also be able to see all your CX insights in one location – with an integrated suite of the following applications:

- **CX Measurement** (model-based surveys)
- **Feedback** (opt-in surveys)
- **Replay**
- **Text Analytics**
- Our new **Case Management** application
- Plus, a new companion mobile app for iOS and Android which will be available in December

The contents of these release notes will give you an overview of ForeSee CX Suite as well as more details on key features and functions.

OVERVIEW OF FORESEE CX SUITE

This section provides a high-level overview of the many features and functions that make up the new ForeSee CX Suite. For more details on each feature, go to the **WHAT'S NEW: FEATURES AND FUNCTIONS** section or click the **LEARN MORE»** link at the end of each feature entry.

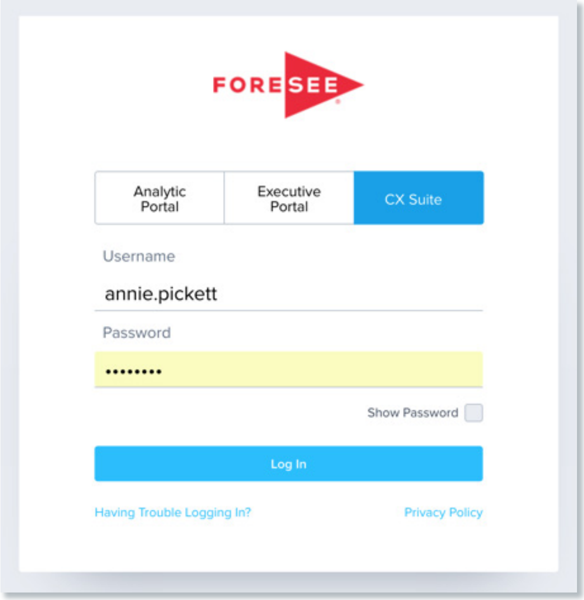
FIRST RELEASE OF CX SUITE

This major release is designed for ForeSee clients to manage all their customer experience tools and data in one place. ForeSee CX Suite is purposefully built for everyone in the organization to access actionable customer experience insights, across any device, using ForeSee's proven methodology. Clients will immediately experience a brand new look and feel and an enhanced user experience that's intuitive and easy to navigate.

THE LOGIN PAGE

The **Login** page has been redesigned to allow easy access to **CX Suite**, **Analytics Portal**, and **Executive Portal**. **Feedback** and **Case Management** customers will use **CX Suite** to access their surveys or cases.

Note: Existing Analytics Portal and Executive Portal customers may gain access to CX Suite by submitting a request to their ForeSee Account Manager.



DASHBOARDS

The new **ForeSee CX 360 Dashboard** is the landing page after a successful login, and provides a holistic view of all your CX measurements. It is comprised of the **Recommended CX Priorities** card, which displays measures in order of Priority Index, and the **CX Journey** card, which consists of each measure's score, benchmark, and ForeSee Top Performers' level. **LEARN MORE»**

SURVEYS

View all your **CX Measurement** (model-based) and **Feedback** (opt-in) surveys in one central location, along with **Replay** integrated with both. You can view each of these separately or collectively, as well as search for a desired survey. LEARN MORE»

CASES

Case Management is a new addition to **CX Suite**, and is designed to enable the management of your customer-related issues in real-time. **Case Management** is currently available for hierarchy supported Store and Contact Center measurement surveys to allow for monitoring cases at a specific hierarchy level. LEARN MORE»

TEXT ANALYTICS

Text Analytics displays the results of applying a natural language processor to open end responses, to identify top keywords and sentiments. The dashboard displays a wordcloud, top 10 keywords by frequency, and related comment card. LEARN MORE»

HELP & TRAINING GUIDE

The **Help & Training Guide** can be accessed at any time by clicking the ***Help*** icon (**?**) on the top navigation bar. This guide has been developed to provide a comprehensive description of each **CX Suite** element, function, and procedure.

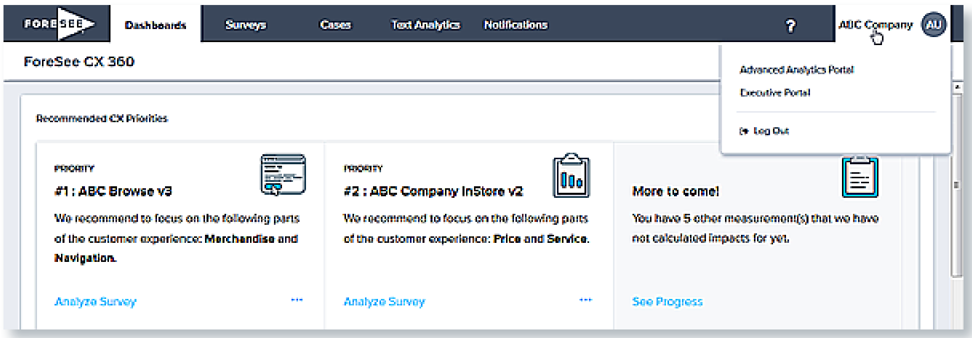
WHAT'S NEW: FEATURES AND FUNCTIONS

This section provides a more detailed explanation of major features and functions in CX Suite.

NAVIGATION

The following is an overview of the CX Suite top navigation bar:

- **Dashboards**: This tab is where you can view the **ForeSee CX 360 Dashboard**.
- **Surveys**: This tab is where you can manage all your surveys, such as **CX Measurement** model-based surveys and **Feedback** opt-in surveys, as well as manage your existing **Replay** integration with both. (Contact your **ForeSee Account Manager** for information on adding Replay to your surveys.)
- **Cases**: This tab is where you can manage all your customer cases related to hierarchy-supported Store and Contact Center measurements.
- **Text Analytics**: This tab is where you can view sentiment and top keywords related to an individual **CX Measurement**.
- **Notifications**: This tab is where you can manage your personal alerts for **Feedback**.
- **?**: This opens our new **Help & Training Guide** that contains detailed instructions about **CX Suite**.



Note: Clients can access Analytics Portal and Executive Portal by using the menu in the upper right-hand corner. The display on the top navigation bar is based on user permission settings.

FORESEE CX 360 DASHBOARD

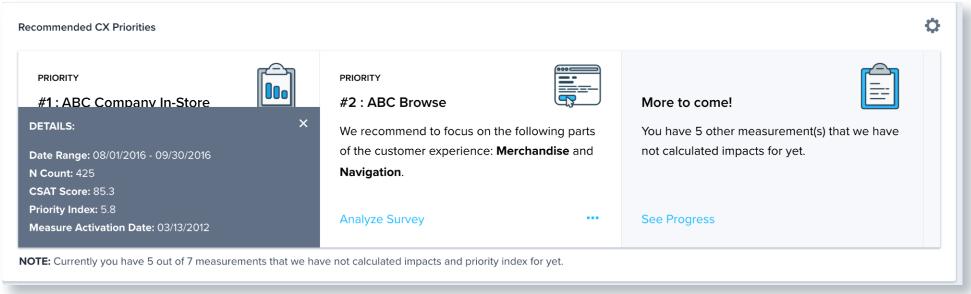
The **CX 360 Dashboard** is the landing page for **CX Measurement** clients after logging into **CX Suite**.

ForeSee has extended its predictive methodology in the new **CX 360 Dashboard** with the introduction of **Priority Index**, which ranks the priority of all touchpoints along the customer journey.

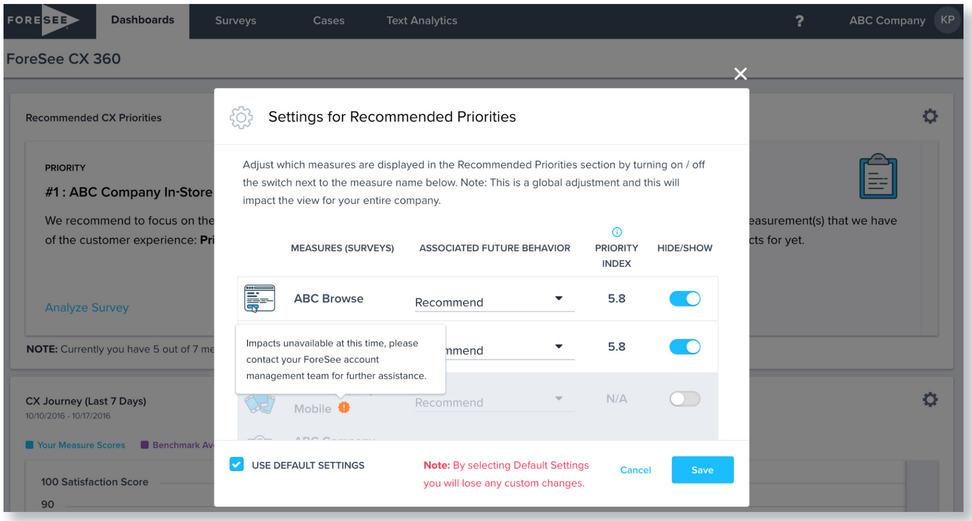
The **Recommended CX Priorities** card displays each measure in order of a calculated **Priority Index**, which is the same methodology used in ForeSee's priority map.

The **Analyze Survey** link allows you to drill into a specific survey of interest. It navigates you to the **Analyze Survey Dashboard** for a closer look into the measure.

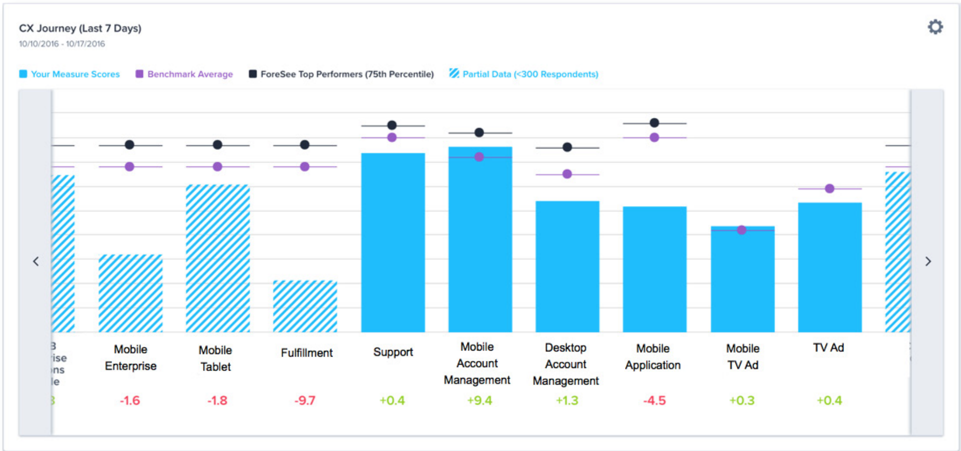
The ***More*** icon (ellipsis) provides additional contextual data points about the survey in a popup dialog, such as monthly impact calculation **Date Range**, **N Count**, **CSAT Score**, **Priority Index**, and **Measure Activation Date**.



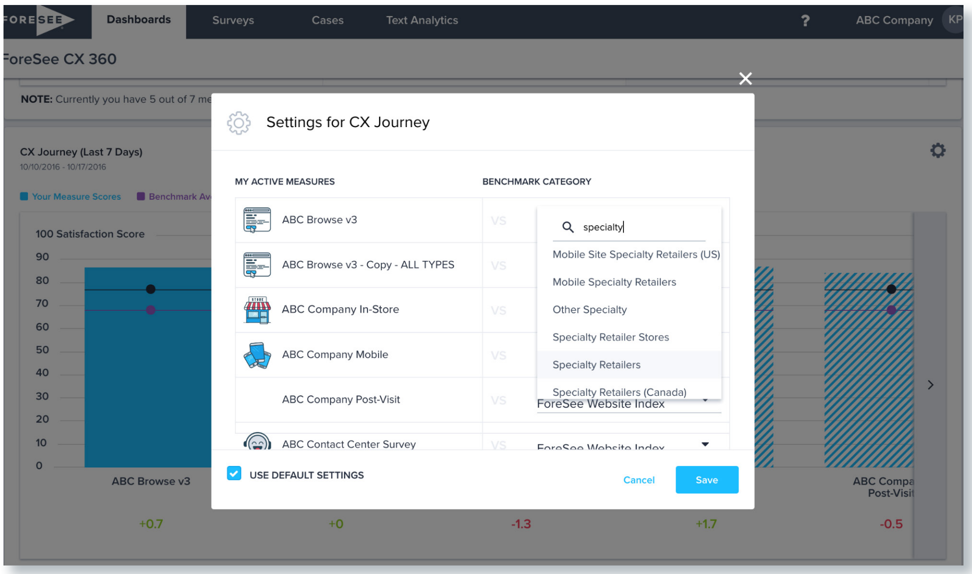
The ***Settings*** icon (located in the upper right corner of the card) allows customization to hide or show measures, change the **Future Behavior** used on the card, or track the n count of measures that do not have enough respondents to calculate impacts.



The **CX Journey** card displays the customer journey across all measures with the average score of the last seven days in comparison to the industry's **Benchmark Average** and **ForeSee Top Performers**. You can also see the trend change at the bottom to assess if scores are increasing or decreasing compared to the prior seven days. You can hover over a measure's score to view more contextual data points. You can also click on a measure on the **CX Journey** card and navigate to the **Analyze Survey Dashboard**. This allows you to drill in and analyze the survey in greater detail.

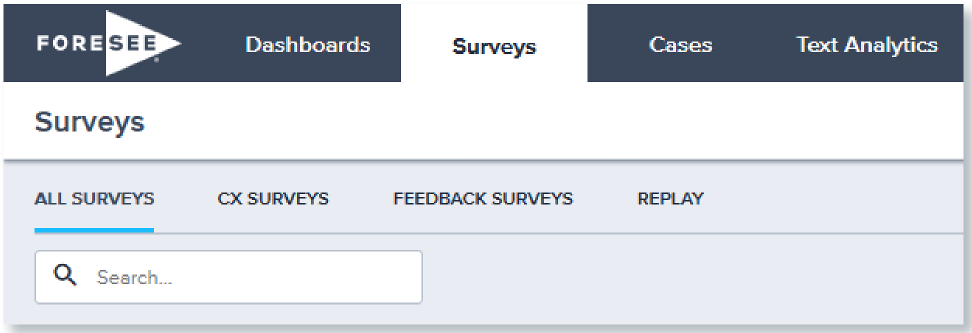


The ***Settings*** icon in the upper right corner allows you to select the desired benchmark category for each survey. The **Search** field is responsive to your entry, to help navigate through over 600 ForeSee Benchmark categories. By clicking on **Use Default Settings**, the system overrides your custom selection when you click ***Save***.



SURVEYS

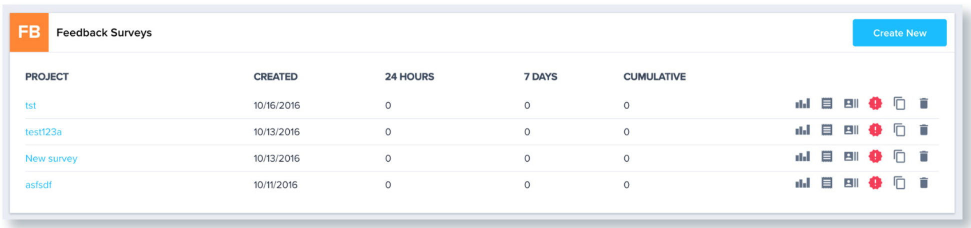
The **Surveys** tab allows you to view all your surveys, for both **CX Measurement** and **Feedback**, in one central location. This is also the location where you can integrate **Replay** into your surveys. (Contact your **ForeSee Account Manager** for information on adding Replay to your surveys.)



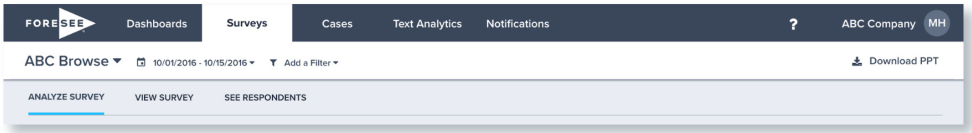
This main survey page allows you to easily find a specific survey and to take immediate action. Using the icons on the right, you can:

- View your analytics
- View your survey
- View respondent data
- Edit, copy, or delete your Feedback surveys.

Note: The Feedback survey displays a red icon to notify users of unpublished revisions.



Click a survey name to view the **Analyze Survey** page, which is a summary of key insights from the survey. Other dashboards of the **Surveys** tab include **View Survey**, which offers details of survey questions and the responses, and **See Respondents**, which is a detailed list view of all who submitted a survey.

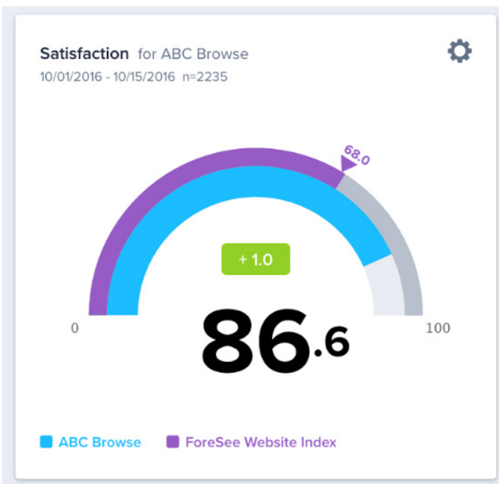


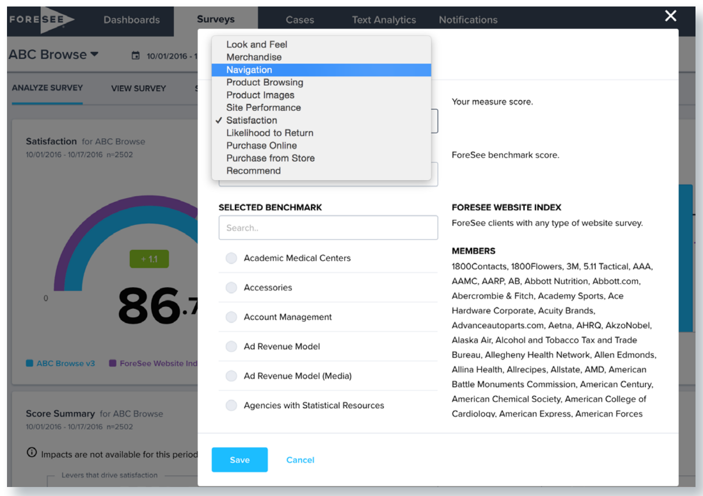
CX MEASUREMENT SURVEY

Analyze Survey

This tab displays five basic analytic cards to illustrate specifics around the customer experience for your selected **CX Measurement**.

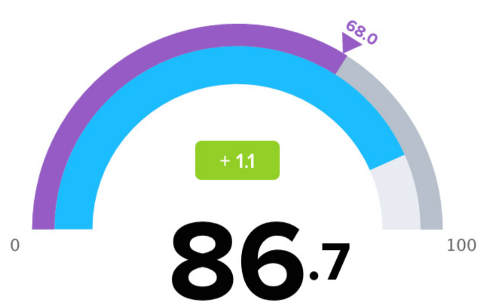
- **Gauge Card**: How am I doing and how do I compare to myself and others?
  - "How am I doing..." is answered by the blue band and large numeric score in the center of the **Gauge** card. The default is your **Satisfaction** score, but you may click the ***Settings*** icon to select a different score.



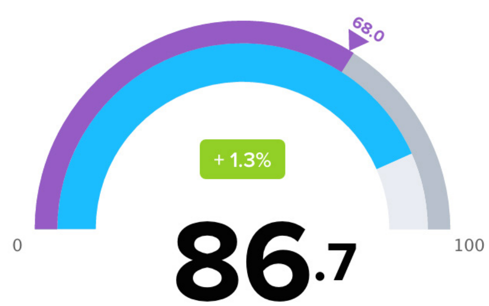


  - "How do I compare to myself..." can be answered by the number in the green or red indicator above the large score in the center. This delta shows a mirror comparison of your score for the specific date range compared to the previous date range. For example, if the selected date range is **Month to Date** (10/1/16 - 10/15/16), the system is comparing your score to the prior **Month to Date** (9/1/16-9/15/16) to determine if score has gone up (green background color) or down (red background color). The default setting shows you the delta in a numeric format, but can be set to show as a percentage. Click the delta to display the percentage change. You can revert back to numeric format by clicking the delta again.

DELTA NUMERIC FORMAT

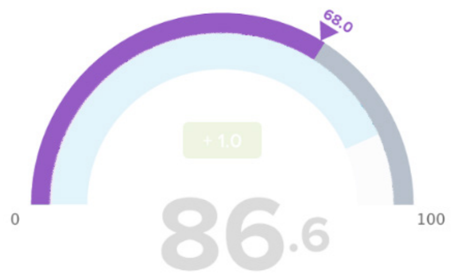


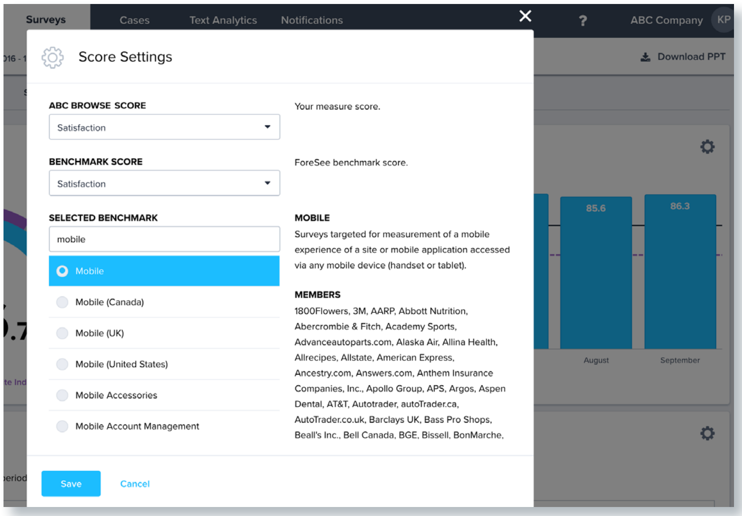
DELTA PERCENTAGE FORMAT



FORESEE

> “How do I compare to my peers, competitors, or best-in-class?” can be answered by the purple band, as it represents 1 of the 600-plus **ForeSee Benchmark** categories. The default is the **ForeSee Index Benchmark**, but can be set to a desired benchmark category by clicking on the ***Settings*** icon. You can also view benchmark participants and a summary of the benchmark category, as that provides additional context to you when deciding why one category may be preferred over another.

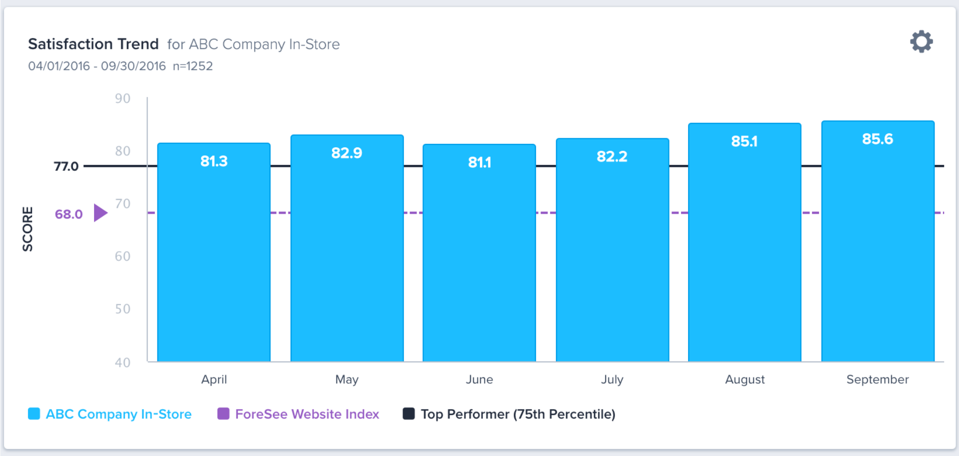




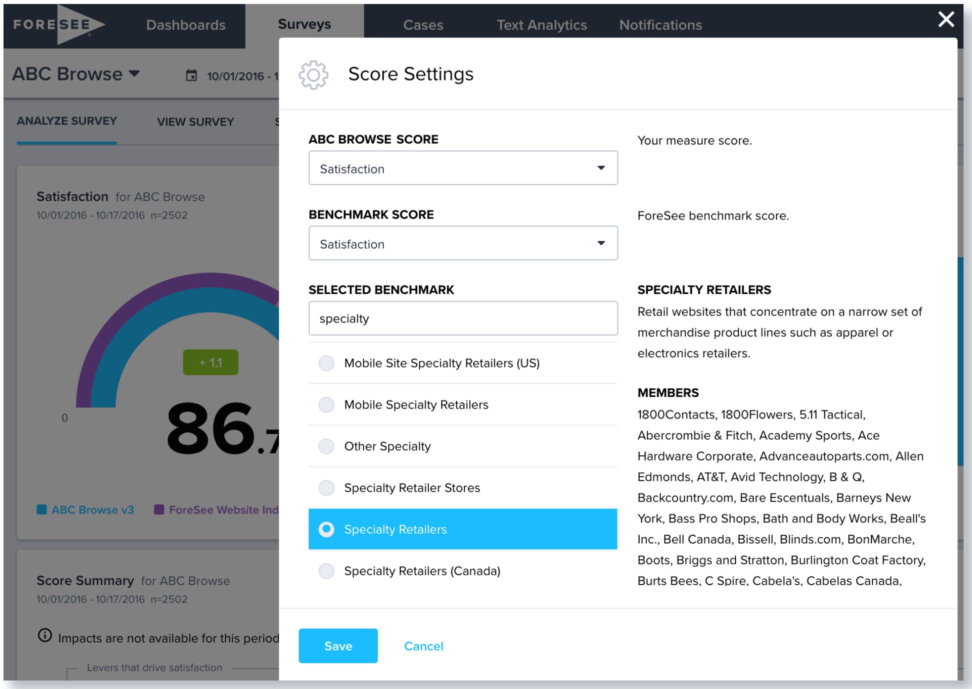
Trend View Card: How am I performing over time, while keeping tabs on the average and top performers of my peers and competitors?

> “How am I performing…” can be answered by comparing your score over time, i.e. is your score increasing or decreasing? The **Trend View** card takes the date range you have identified (e.g., September) and applies a similar range to the previous bars to plot out your trend view (e.g., five previous months to September).

> You can also see if your score is overperforming or underperforming compared to your peers, competitors, and top performers.



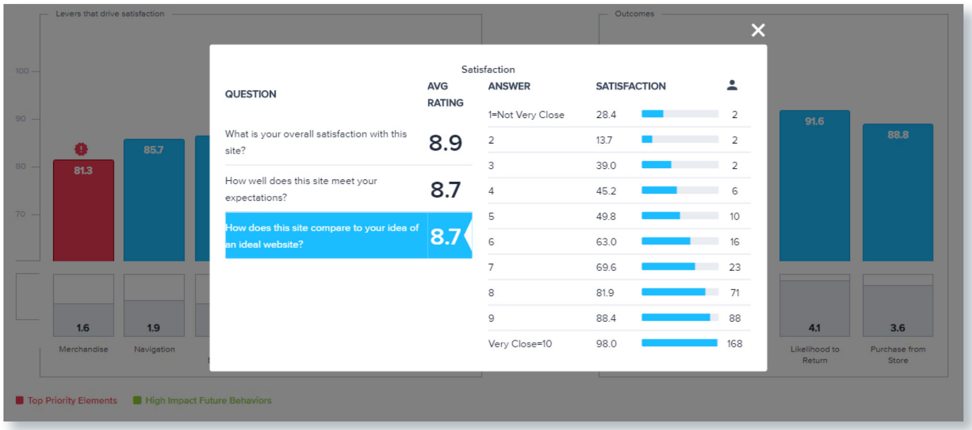
> Click the ***Settings*** icon to display the desired score and benchmark category.



- **Score Summary Card**: What do I need to focus on and why?

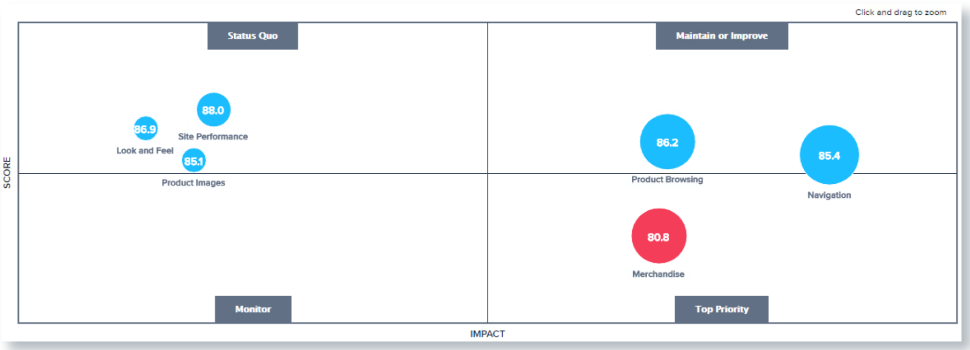
  > This question can be answered by the **Score Summary** card. By default, the card shows scores for **Elements**, **Satisfaction**, and **Future Behaviors**. Click the ***Generate most recent impacts*** link to see the impact calculations applied, as well as a visualization of the top priorities (key elements in red) and your greatest return on investment (key future behavior in green).

  > To understand the components that make up a particular **Element, Satisfaction**, or **Future Behavior** concepts, click on the bar graph to see each in more detail.

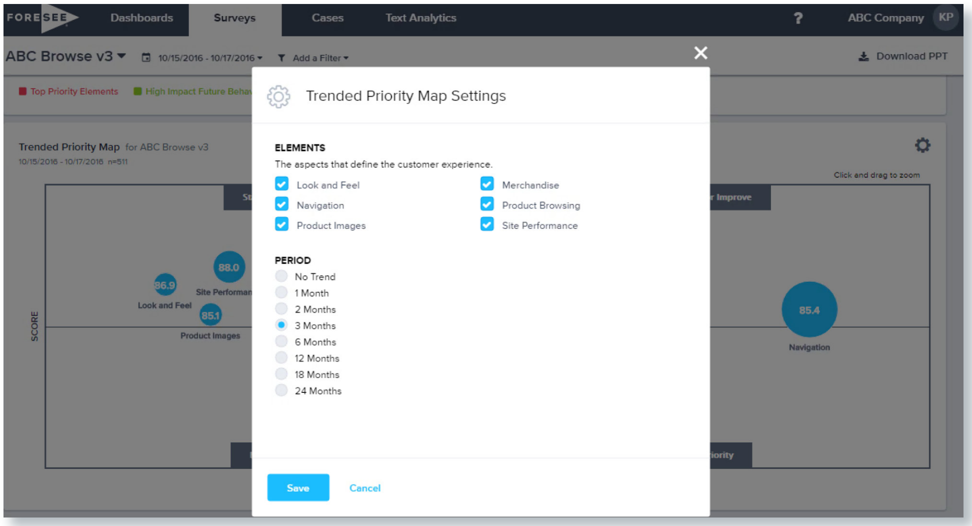


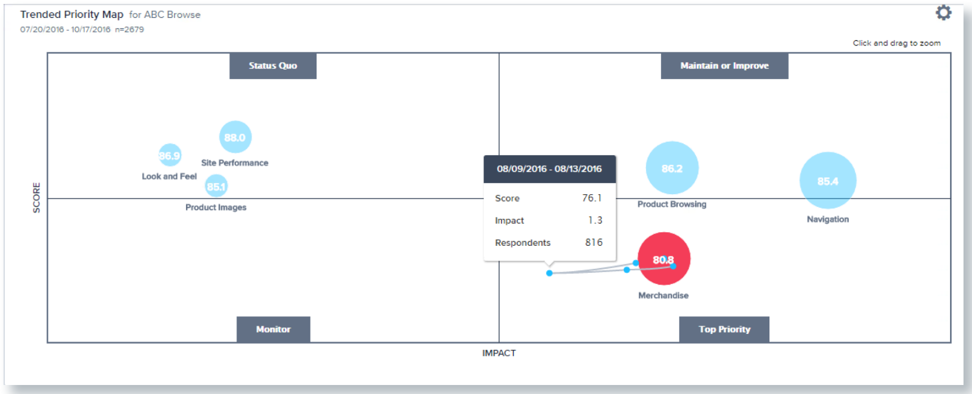
- **Trended Priority Card**: What is the aspect of the customer experience with the biggest opportunity for improvement? How has this element trended over time and are we putting the right efforts in place to improve the experience?

  > "What is the aspect of the customer experience that has the biggest opportunity for improvement..." can be answered by selecting the ***Generate most recent impacts*** link of the elements plot within the priority map. The map plots each element in the appropriate quadrant to display the importance of company investment, status quo (high score, low impact), monitor (low score, low impact), maintain or improve (high score, high impact), or the top priority quadrant (low score and high impact).

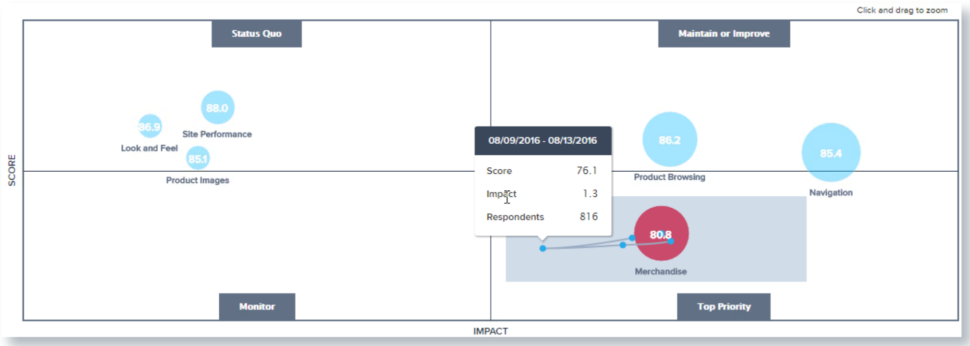


  > "How has this element trended over time..." can be answered by clicking the ***Settings*** icon and setting the **Trended Period**. You can also deselect elements so they don't display in the trended priority map. Each data point on the trend has a hover pop-up so you can view more details, like the date range, **Score**, **Impact**, and **Respondent** count.

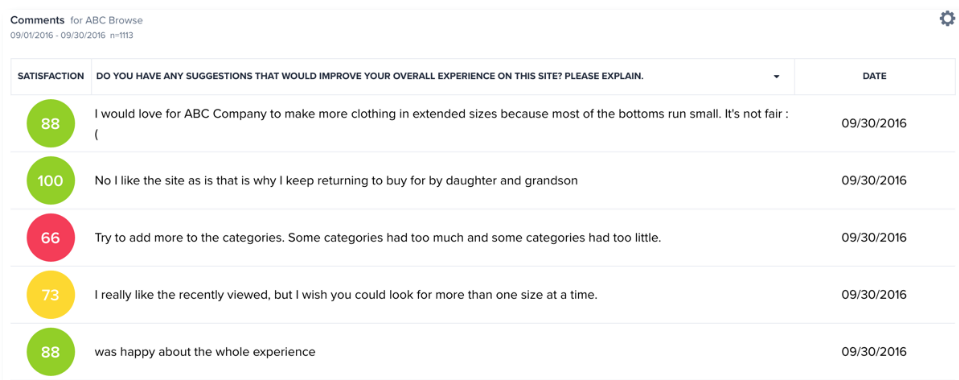




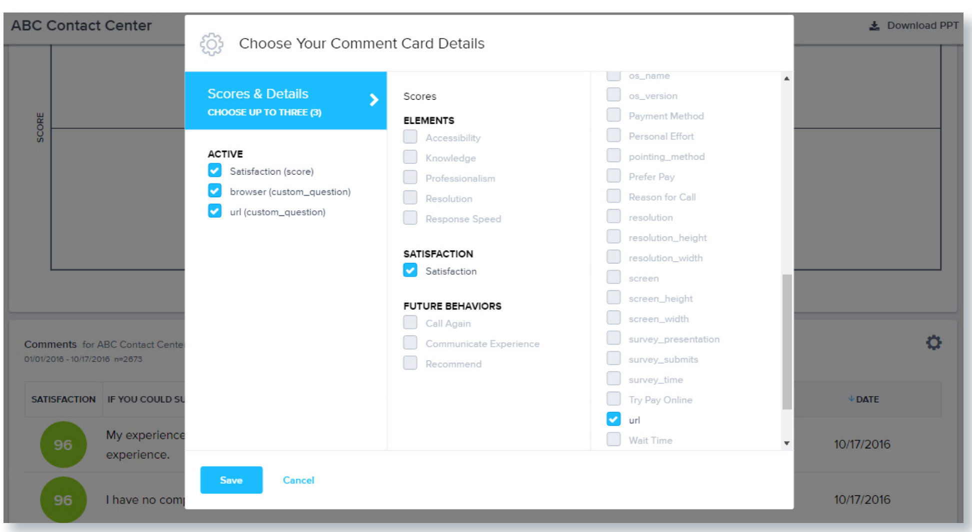
> Click and drag a box around an element to zoom in for a closer view of the element trend lines and data points.

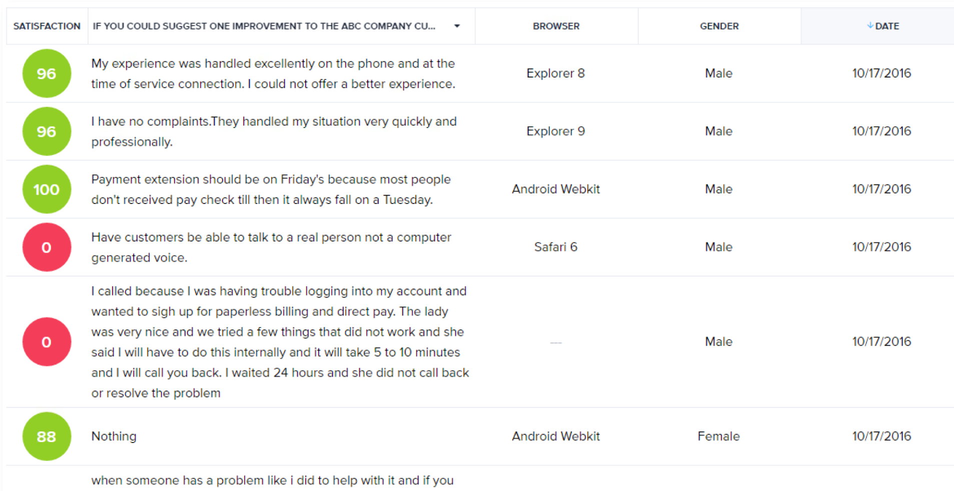


- **Comment Card**: What are customers saying about their experience and, how I can understand their frustrations or happiness with their experience and my company? Did something that we changed on the site impact the customer completing their task or converting during their visit?
  - “What are customers saying about their experience...” can be answered by selecting any of your key open-end questions on the survey and reviewing the responses. The default view displays the **Satisfaction** score, last open-end question, and the date of the response. Click the open-end question along the top of the card to display a menu of each open-end question, and select a desired question to view the response.



  - “Did something we changed on the site impact the customer completing their task...” can be answered by clicking the ***Settings*** icon and choosing up to three key attributes, such as scores, individual responses to survey questions, or user details like browser or operating system. This adds attributes display on the **Comments** card as additional columns.

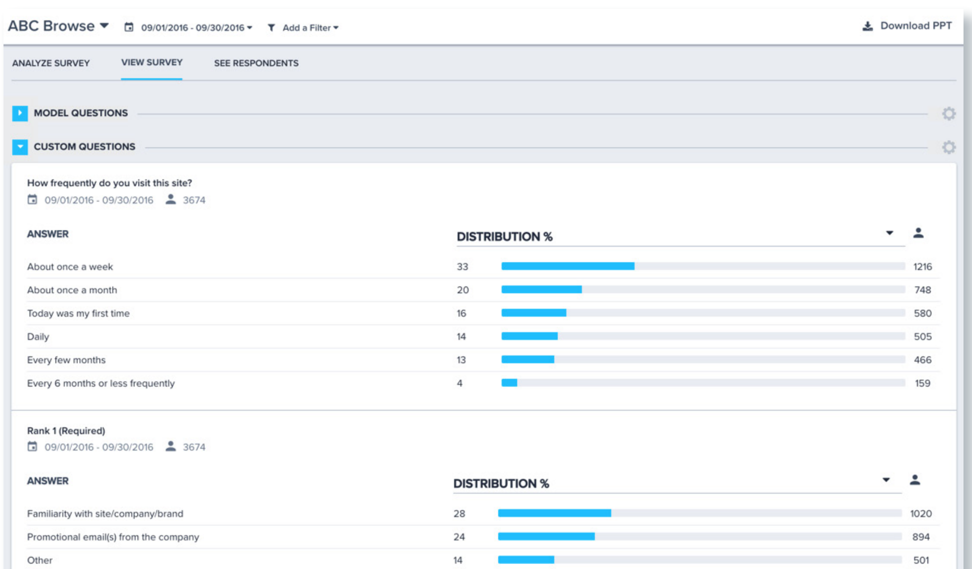




SATISFACTION	IF YOU COULD SUGGEST ONE IMPROVEMENT TO THE ABC COMPANY CU...	BROWSER	GENDER	DATE
96	My experience was handled excellently on the phone and at the time of service connection. I could not offer a better experience.	Explorer 8	Male	10/17/2016
96	I have no complaints.They handled my situation very quickly and professionally.	Explorer 9	Male	10/17/2016
100	Payment extension should be on Friday's because most people don't received pay check till then it always fall on a Tuesday.	Android Webkit	Male	10/17/2016
0	Have customers be able to talk to a real person not a computer generated voice.	Safari 6	Male	10/17/2016
0	I called because I was having trouble logging into my account and wanted to sigh up for paperless billing and direct pay. The lady was very nice and we tried a few things that did not work and she said I will have to do this internally and it will take 5 to 10 minutes and I will call you back. I waited 24 hours and she did not call back or resolve the problem	—	Male	10/17/2016
88	Nothing	Android Webkit	Female	10/17/2016
	when someone has a problem like i did to help with it and if you			

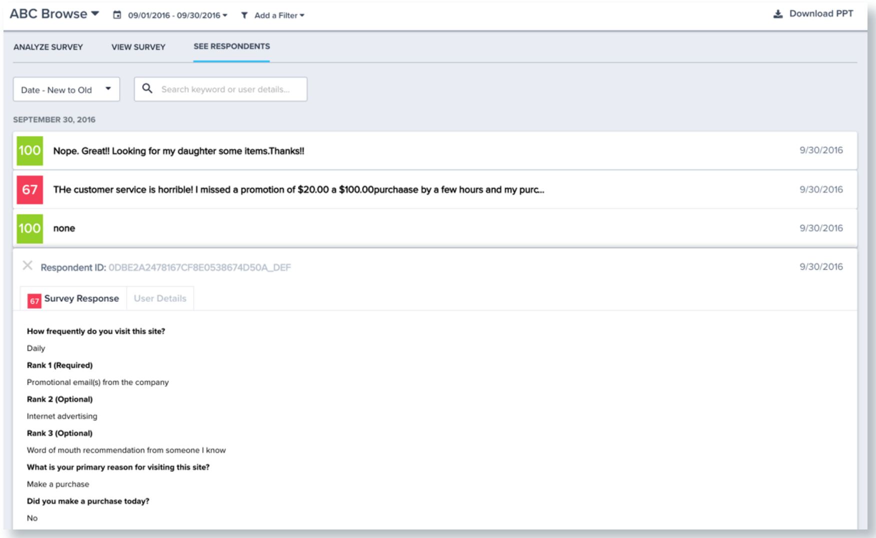
View Survey

This tab displays the model and custom questions on your survey, as well as the satisfaction scores and distributions by answer choice. You can customize the survey view to only include the top questions you or others in your organization care most about, such as the common custom questions like **Primary Reason**, **Visit Frequency**, and **Task Accomplishment**.



See Respondents

In this section you have a more granular view of each individual respondent. This tab displays a list of each respondent and their survey details, such as answers to the survey; the **Replay** video of their experience, if applicable; and other key user details, such as operating system, browser, or referral URL.

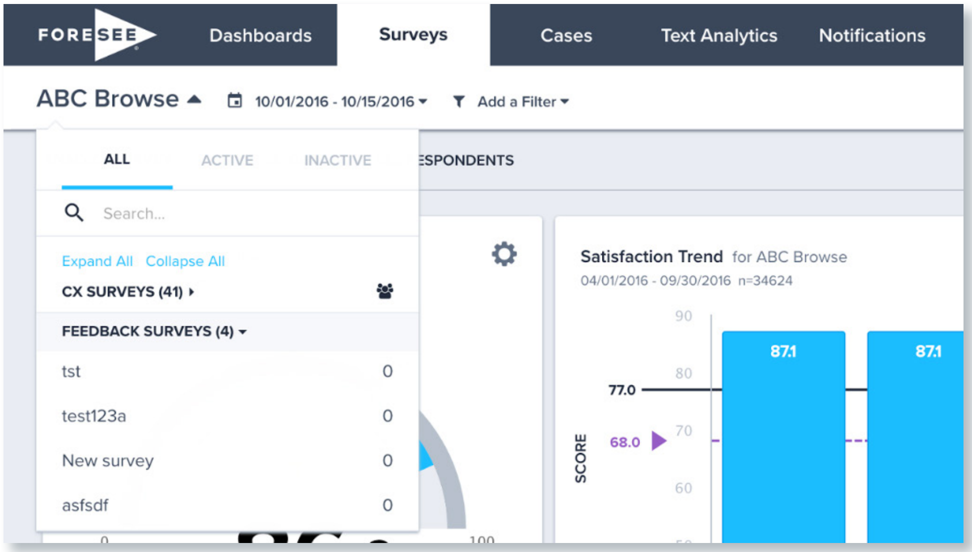


Filtering

The **Filter** panel is located below the top navigation bar. You can use this panel to select between surveys, choose your date range, and apply survey and hierarchy filters.

SURVEYS MENU

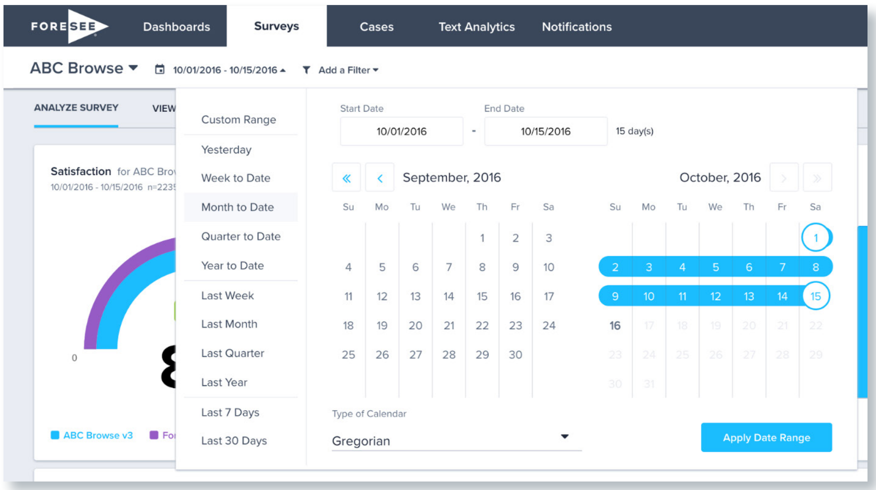
Here you can easily switch to a different survey by clicking on the down arrow next to the survey name. You can find your survey by typing into the search bar, or using the **Active** or **Inactive** tab. The **Survey** menu is categorized by survey type: either **CX Surveys** or **Feedback Surveys**, if applicable. The number to the right represents total number of respondents.



DATE RANGE

You can use the **Filter** panel to choose a specific date period. Here are a few options:

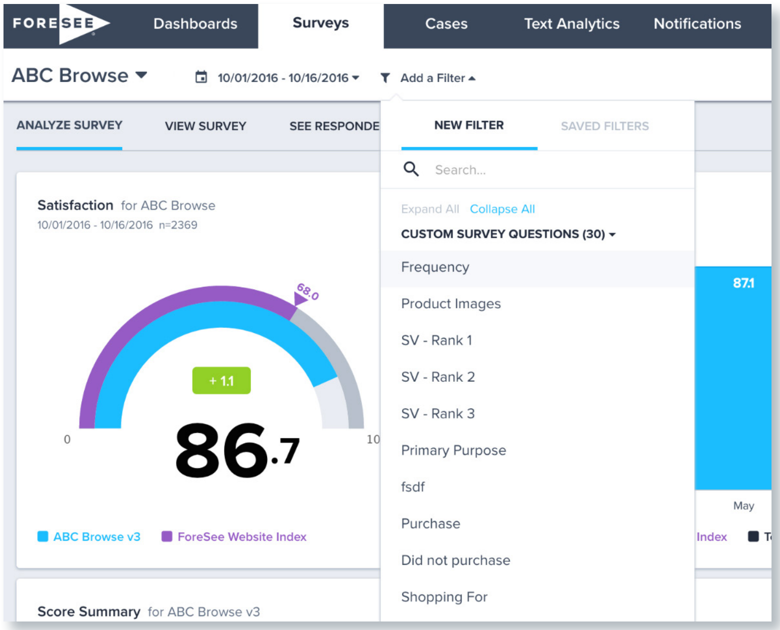
1. Predefined date range menu on the left.
2. Create a custom date range by entering **Start Date** and **End Date** in the text boxes.
3. Click the start and end dates in the calendar.
4. There is also the option to select calendar type of Gregorian or Fiscal calendar, if applicable.
   Note: Feedback date filter remains the same with only custom calendar selection.



SURVEY FILTERS

You can easily build new, replace existing, or delete CX survey filters. The **Search**, ***Expand All***, and ***Collapse All*** features allow you to quickly find a specific field. In addition, you can access any of your saved filters by selecting the **Saved Filters** tab, including those that were previously saved from the **Analytics Portal**. Any modifications to saved filters are synchronized between the **Analytics Portal** and **CX Suite**.

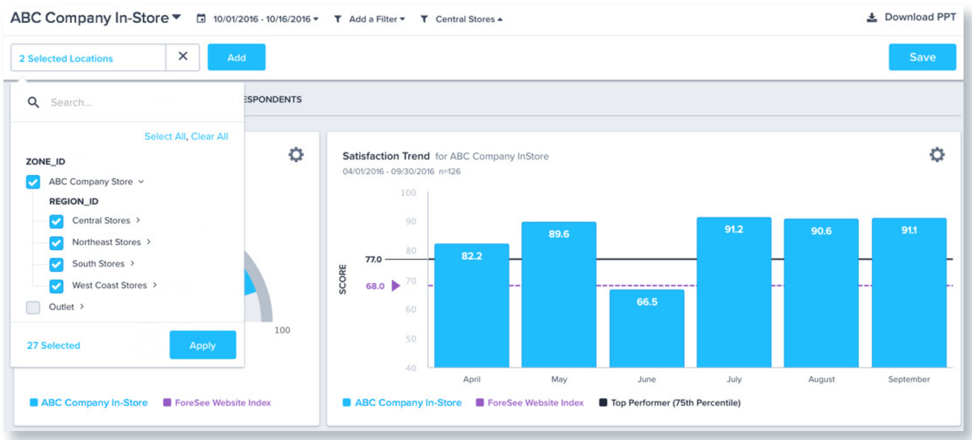
Note: Feedback filtering remains the same with click filtering within the dashboard.



HIERARCHY FILTERS

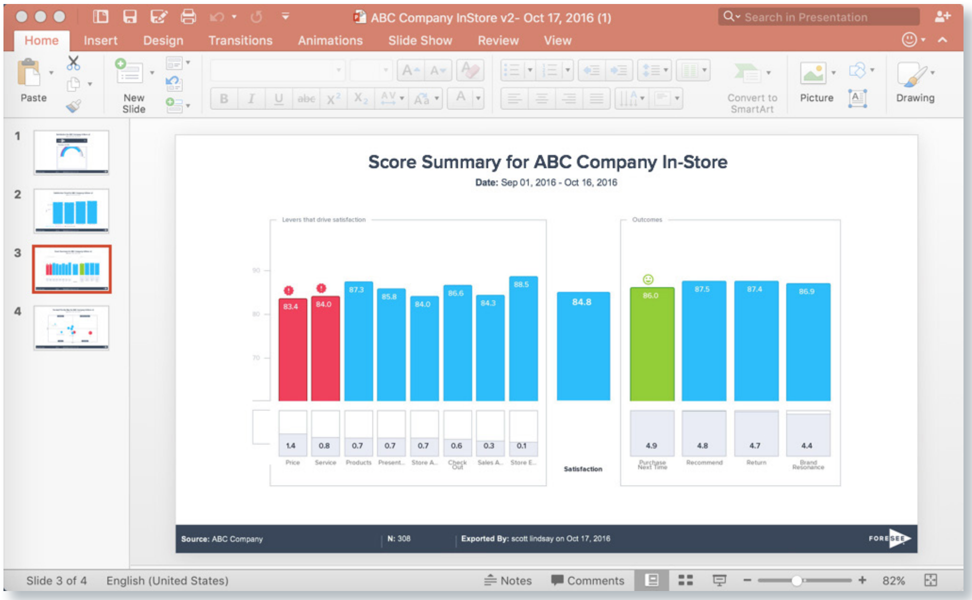
You can now easily drill down a hierarchy tree to find a specific location. The new hierarchy component makes it easy to build new, replace existing, or delete unwanted CX hierarchy filters. **Search**, ***Expand All***, and ***Collapse All*** the layers of your hierarchy to help navigate to the most relevant results. Use the **Search** field to find related hierarchy results. This **Search** field is responsive to your input and displays matching results as you type.

The **Hierarchy Filter** is organized into two sections: **Locations** and **Attributes**. Expand each section to see up to three layers at a time, or collapse to hide sections that are less important to you. Or, use the ***Back*** button to revert back to a higher level. In addition, you can access previous CX hierarchy filters from the **Analytics Portal** in **CX Suite**, located on the **Saved Filters** tab. Any modifications to saved filters are synchronized between **Analytics Portal** and **CX Suite**.



Downloading

Socializing data within your organization is really important. With that in mind, **CX Suite** offers an export functionality with a new formatted **PowerPoint**. You can export the **CX 360 Dashboard** and **Analyze Survey Dashboard** into this **PowerPoint** format. The CX 360 Dashboard export includes up to the top three priorities from the recommended priority card and up to the first 10 measures from the CX Journey card. The Analyze Survey Dashboard export includes each card is a separate slide in the **PowerPoint** deck. In addition, the export of raw data is supported by way of the **CSV** format for any survey.



Within **CX Suite** for **Feedback**, you continue to have the ability to download **CSV** and **PDF** files. What was currently on a separate **Reports** tab is now in-line while viewing your analytics.

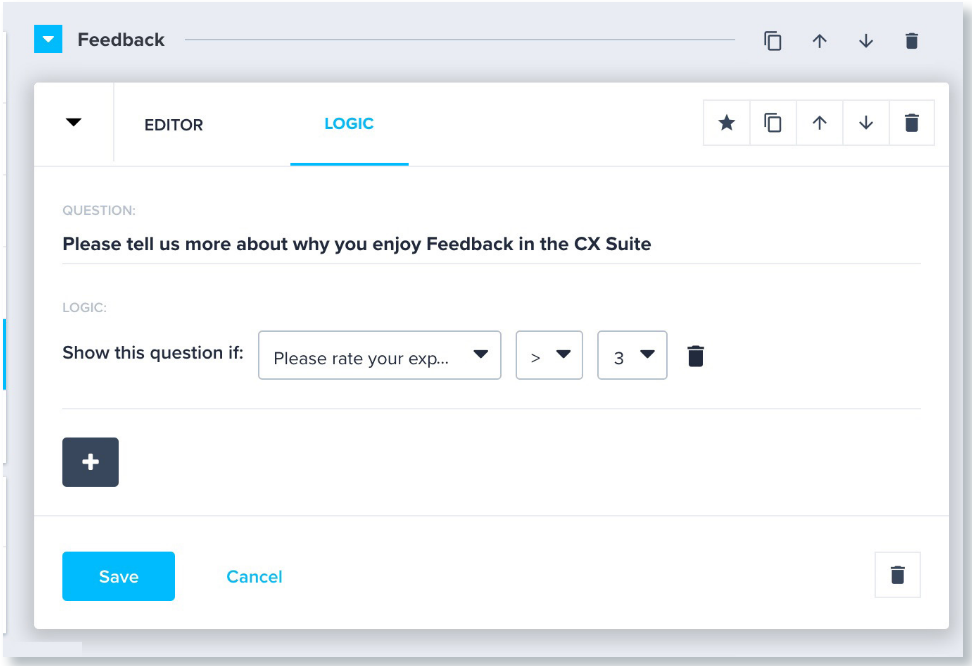
FEEDBACK SURVEY

Feedback Skip Logic and Required Star

Skip Logic is a new feature added to the **Survey Builder for Feedback** within the **CX Suite**. When building surveys you are now able to add logic to questions within a given **Topic**.

With the new **Logic** tab within each question, you have the ability to show this question when the response to another question meets the criteria. You are able to add logic based on question response, which includes the ability to use a keyword in a wordcloud.

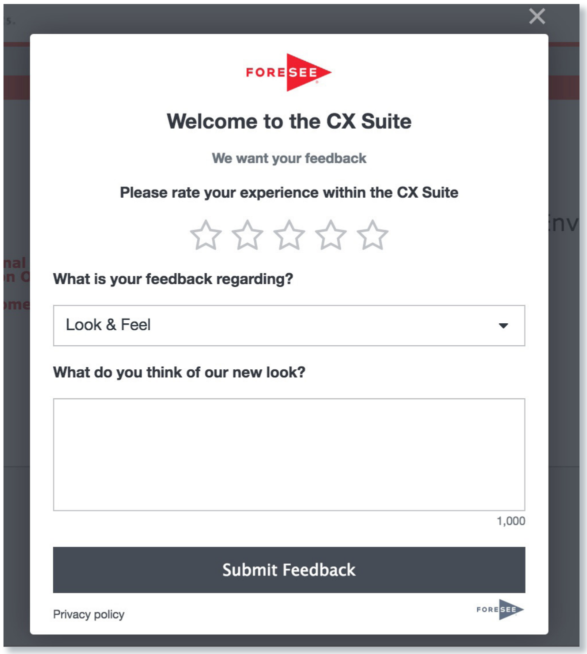
Once **Logic** has been added to questions, you are able to see which questions have logic by the ***Logic*** icon within the questions.



As part of **Skip Logic**, we have added the ability to designate questions within the **Feedback** survey as required. Previously, only the star rating is required. You are now able to tag subsequent questions as required to complete the survey. You can leverage this functionality by clicking the ***Star*** icon within the question **Editor**.

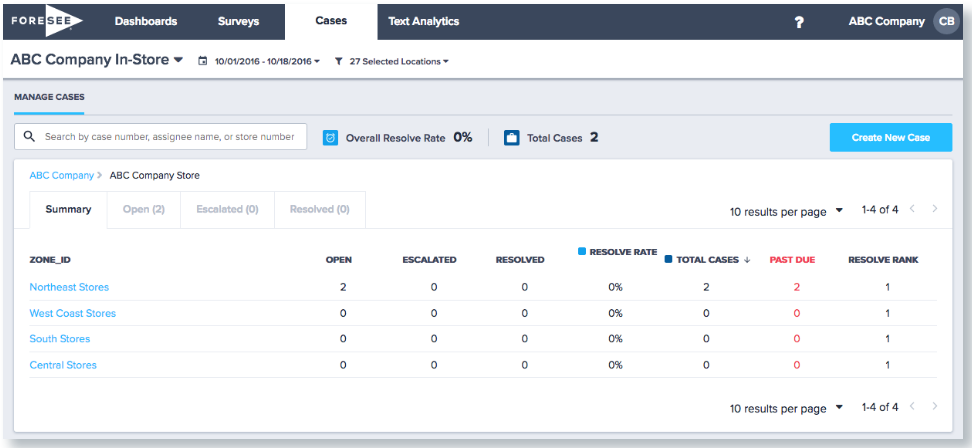
ENHANCED SURVEY LOOK AND FEEL

Based on customer feedback, our top designers have made enhancements to the look and feel of Feedback surveys. Key changes include: left alignment on questions, increase width of submit button, gray ForeSee logo, and additional padding.

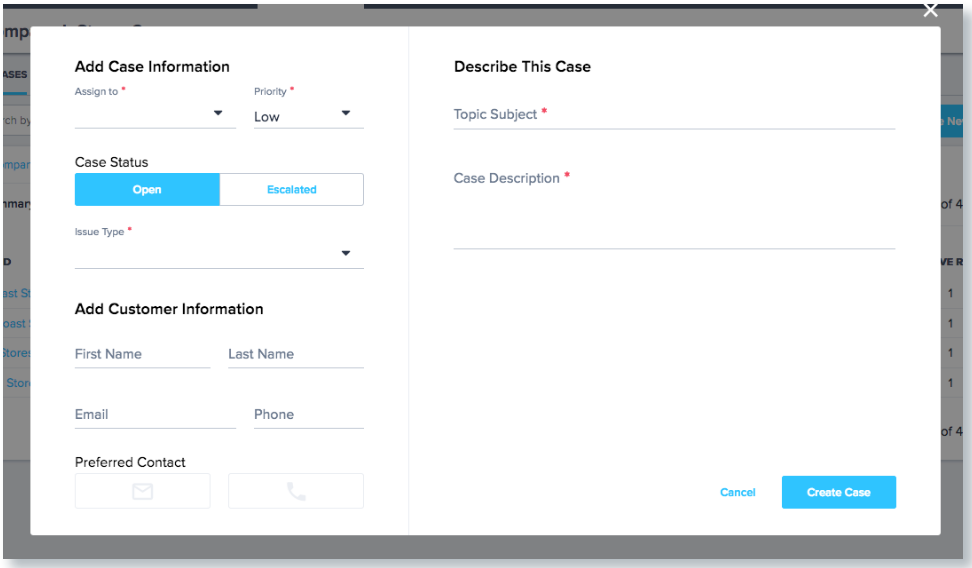


CASE MANAGEMENT

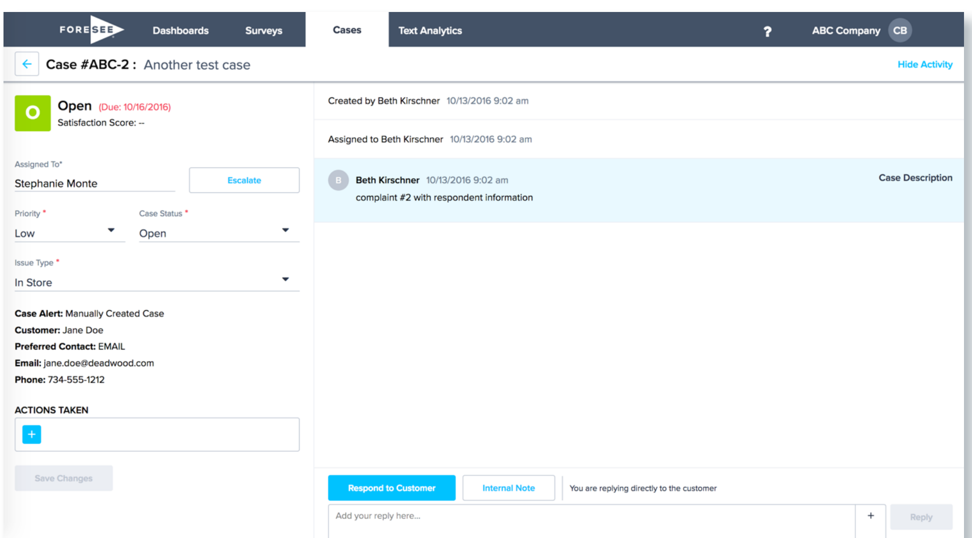
Case Management is a new addition to **ForeSee CX Suite**, designed to enable the management of your customer-related issues in real-time. **Case Management** is currently available for hierarchy supported CX measure surveys to allow you and others in your organization to see cases at a specific hierarchy level. Depending on their role, an agent or store manager sees only their assigned cases, while a district manager or call center supervisor may view cases for their entire district or their full agent team.



Cases may be generated automatically from a triggered rule for a hierarchy supported CX Measurement survey, or manually created to support customer service issues as well as other types of customer feedback.



You can track each case to ensure each issue is resolved properly within a configurable period of time (e.g., within 72 hours of case creation). Each case contains a description of the issue, customer contact information, and internal and external conversation threads, as well as documentation of each step taken to resolve the issue. You can also have specific customer facing email templates available to be used by those resolving the case, which helps with consistency and saves time.

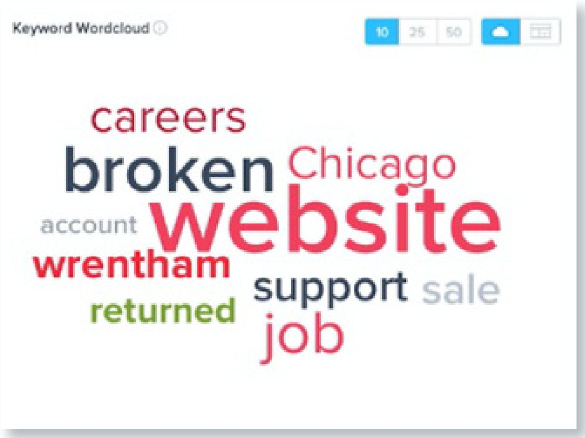


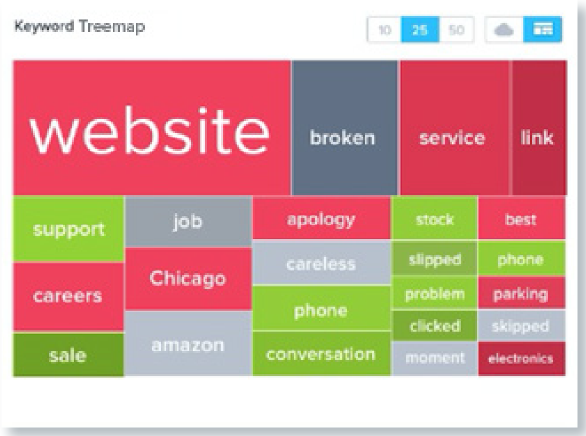
TEXT ANALYTICS

Text Analytics displays the result of applying a natural language processor to open end responses, generating an array (or wordcloud) of the most commonly used words in a color-coded, interactive graphic. (Please contact your ForeSee account manager to learn more.)

Example: The word "website" is displayed as the largest word and in the color red. This indicates that many respondents have had a negative experience with the website.

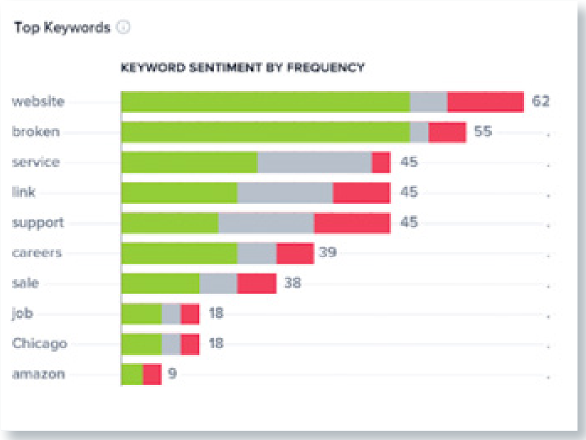
Wordcloud / Treemap





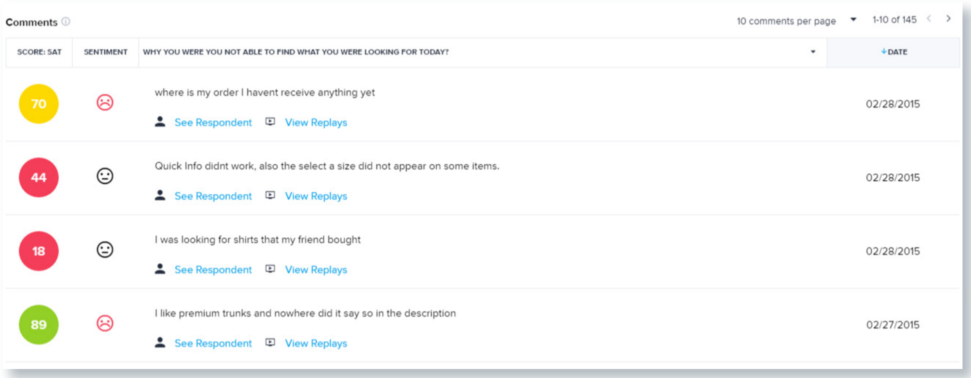
Top Keywords

In addition to the wordcloud, **Text Analytics** displays the top 10 words in a Keyword Sentiment by Frequency chart. This bar chart shows number of positive, neutral, and negative sentiment comments for each of the top words used.

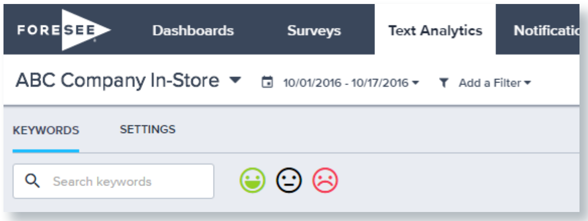


Comments

The Comment card contains all open all open-end responses for the question displayed in the header. You can click on the question to display a menu of other questions to select from.



Data in the **Text Analytics Dashboard** may be filtered by date range and question, similar to the controls in survey dashboards. Additionally, **Text Analytics**-specific controls let you search for words within the analyzed text, and also filter on comments with positive, neutral, or negative sentiments.



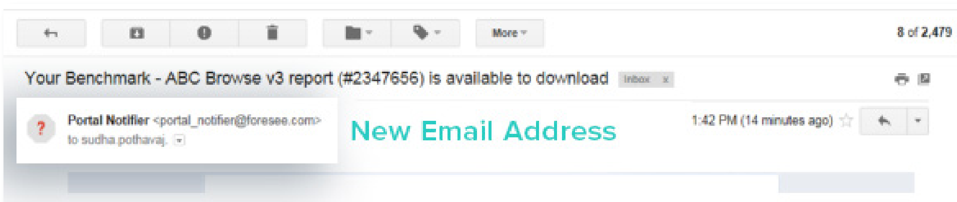
NOTIFICATIONS

This page contains a list of **Feedback Alerts** where you can manage existing alerts and create new ones.

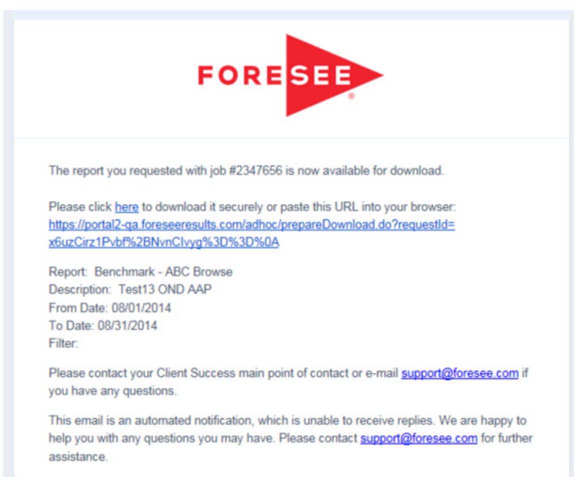
Updates to Report Subscription Emails

The following changes have been made to subscription emails:

- The **Sent** address is now portal_notifier@foresee.com. Please be sure to add this to your whitelist if your network environment requires one.



- Changes to the email body content – The messaging of the email has been updated to reflect some changes at **ForeSee**. For example, you may now contact our support specialists with any questions, concerns, or issues with your subscription.
- New file type – The new email template is an **HTML** file, which is supported by most email applications with the exception of **Microsoft Outlook**. We hope to have **Outlook** support implemented in a post-fall release.


FORESEE

The report you requested with job #2347656 is now available for download.

Please click here to download it securely or paste this URL into your browser:
https://portal2-qa.foreseeresults.com/adhoc/prepareDownload.do?requestId=x6uzCirz1Pvbf%2BNvnClvyg%3D%3D%0A

Report: Benchmark - ABC Browse
Description: Test13 OND AAP
From Date: 08/01/2014
To Date: 08/31/2014
Filter:

Please contact your Client Success main point of contact or e-mail support@foresee.com if you have any questions.

This email is an automated notification, which is unable to receive replies. We are happy to help you with any questions you may have. Please contact support@foresee.com for further assistance.

QUESTIONS

- Please refer to the Help & Training Guide (**?** in CX Suite)
- Contact support at support@foresee.com
- Connect directly with your account manager

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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