Serious Specs
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klzii®

What's Inside?

Introduction

- **klzii** is designed to be a fun & entertaining, online platform, for engaging in private, social chats with your customers, staff - anyone with an influence on your business.

- To get instant, actionable answers to the Why of your burning issues, improve your product/service, and generate more sales based on the feedback.

- And under the bright, shiny hood is a serious set of tools and functionality, to make it easy for you to set-up, and chat on any device, anytime, anywhere.

- No apps or software to download, just login and go!

- Contextual Help Tips & Walkthroughs, How-To videos and PDF Guides a click away.

Quick Overview of How klzii Works

- Sign-up for a new Account as **Account Manager**

- Choose from 3 main Admin/backend tabs for managing the Account and setting up the Chat Sessions.

    Tab-1: Account Profile to upgrade Plan and add new Account Managers.

    Tab 2: Chat Session Builder takes you through 5 steps from set-up Name/Facilitator/Time/Date, choose between the formats of open Forum (unlimited Participants) or Focus group (maximum 8 Participants), create Topics, customise Emails, select Participants from a Contact List, and invite Observers

    Tab 3: Resources is where you manage Session support materials such as the multi-media Gallery, Contact Lists add/import, Recruiter mini-survey, Topics, Email Templates and pre-set Brand Colours.

- The **Forum & Focus Chat Rooms** are where the discussions take place, using a range of features to stimulate Participants, so they share freely, provide you with the answers you're looking for, and want to come back for more in future Sessions.

- Features for engagement include our customisable, animated Avatar **Biizu**, multi-media player, interactive Whiteboard and Pinboard (Focus), and social-style posts with emoticons.

- Instant reporting in Exec-PDF, Analysis-CSV and text-only for Word Cloud formats.

Detailed Specs

Accounts

- All activity takes place within an **Account**, titled with a unique name
- A new **Account Manager** starts with a 21 Day Free Trial that can be upgraded at any time to a Senior, Core or Junior paid Plan, or stay with a limited Free Account

klzii Roles & My Dashboard

- Anyone can have access to multiple Accounts and Roles in **klzii**, depending on whether they've opened their own Account, been selected as a Facilitator, or invited as a Participant or Observer.
- At login, you first go to My Dashboard, and select which Account, Role, and Chat Session you want to enter.

Tab-1: Account Profile

- Upgrade Paid Plan, and purchase further SMS credits.
- Add more Account Managers to share the workload, cover leave, and look after individual brand projects in an enterprise.

Tab-2: Chat Session Builder

- **Step-1: Name your Chat Session, set the Start & End Times/Dates.**
- Choose whether Forum or Focus format.
- Select the Facilitator from any Contact List.
- Select your Brand Logo and Colours for emails and the Chat Room (optional).
- **Step-2: Create discussion Topics,** whether new, or from existing Topics in previous Sessions, and/or the Topic bank you've pre-set in Resources.
- At any time, before or during the Session, you can change the order of Topics, select a Landing Topic, or choose to Show/Hide a Topic.
- Keeping to one idea per Topic provides fast access to insights in Reporting.

- **Step 3: Customise the Chat Session invitation and follow-up emails**.

- This quality-control feature ensures you have modified all the emails to Participants, in your style, before being sent.

- It includes the first Invitation then the auto-emails triggered by whether they accept or decline the invitation, and the Session Closing-Thanks email.

- Extra images and video links can be added to any email.

- Incentive, Start&End Time/Dates and Facilitator contact are all auto-filled, along with suggested default text.

- Brand Logo & Colours are included if selected in Step 1.

- A Generic Email can also be customised for any communication with your Contact List(s). Which makes it possible to run a "pop-up" community on a tight budget.

- And all customised emails are automatically saved for potential future use, along with versions you can pre-set in Resources.

- **Step 4: Select and invite Participants** to your Chat Session, from a Contact List, which includes previous Response-History, rating and profile fields. This enables priority invitation of those not contacted for a while, and who best fit the needs of the Session, and prevents over-use of Contacts.

- The Contact List can be created or added to from here, including using the Recruiter mini-survey. Same as in Resources.

- Accept/Decline Responses to the invitation emails are tracked here, so further invitations can be sent to "top-up" the Participant numbers as needed. All responses are written back into the individual Participant's history.

- In Focus format SMS texts can be managed and sent from here, as reminders of Session start-times, and other alerts.

- Generic emails can also be sent as another form of messaging and alerts.

- **Step 5:** is for **selecting and inviting Observers**, from any Contact List (optional).

- This is used when you would like other staff and other stakeholders to view a Session in progress, without being able to interact with Participants, who will not know if anyone is viewing.

Open & Close Chat Session

- The Facilitator can enter the Chat Room at any time to prepare Topics and activities, interact with Participants when Open to them, and produce Reports.

- **klzii** is highly visual and social, so we recommend using images on the Whiteboard, running a Pinboard exercise, and playing multi-media to stimulate Participant engagement for better results. More on this in Resources below.

- At the Close of the Session, you can Rate each Participant and make comments on their contribution (not visible to them). Rating averages are also displayed on your Sessions list, so you can monitor the big picture of Session quality.

- The Session-Closing-Thanks email includes response on interest in future Sessions, which is recorded in their History.

Tab-3: Resources

- Both smaller and larger enterprises can save considerable time setting up **klzii** Chat Sessions using Resources prepared earlier, and also saved automatically from previous Sessions.

- Resources can be drawn on by specific themes or managed for individual brands.

- The **Gallery** stores images, video, audio and PDF files, including **klzii** Stock Images to get started.

- **Contact List** management includes creating a new List manually, using Recruiter, or importing an existing database.

- **Recruiter** is a powerful mini-survey tool that can be branded with your logo. It asks a basic set of customised questions both closed and open-ended types, with suggested defaults, can include video or audio files, and collects research permissions to build an instant Contact List from scratch, via a hot-link on your social media, website or email campaigns.

- Importing an existing database is made easy with a Mapping tool to arrange your fields to be **klzii**-compatible.

- All Contact Lists can include Custom Fields specific to your business such as demographics, purchase behaviour, or attitudes to your brand, so you can run a Session where all Participants share the same profile OR mix them up.

- **Topics** can be created anytime for future use, including those used in previous Sessions, which can be copied and modified to save time when you have common themes, and/or want to trend longer-term patterns of insights.
- **Email Templates** is also very useful for one-time preparation of future Sessions by allowing you to customise emails in your own brand style and saving them with unique names. Even Generic emails could be saved as specific message themes to use in a "pop-up" community scenario.
- Brand Colours can be stored as a variety of Schemes for different brands and occasions, to be applied in emails and Chat Room Sessions.

Chat Sessions & Chat Rooms

Introduction

- At the heart of **klzii** is the **Chat Session.**
- Where your Facilitator and customer-Participants get together in a **Chat Room,** to discuss your big issues, using our unique array of creative, visual & social activity tools to entertain & engage for deeper, more emotional insights.
- Listed below are tools common to both Forum and Focus formats, and those for Focus only.

Common Chat Room Features

- **Facilitator Billboard** where chat-starters are posted to define the activity in a Topic.
- **Topics** are listed in a drop-down for selection by Participants, and set by the Facilitator for Landing Topic, order, and which are shown or hidden at any time.
- **Participants Post their comments** in a social-media style format, where they can change the Emoticon next to their Post, Reply to others, or award a Like.
- Each time someone Posts, a beep will be heard, and a number will appear at the top of the Topic menu showing the **total number of unread Posts**, and inside the menu how many Unreads in each Topic, so you can go directly to those Topics.

- Same with Replies to any of your own Posts. The total will display on top, and their location inside the menu.

- When you go into the Topic the new Post or Reply will be shaded for a short time, so you can quickly find it.

- If you leave the Chat Room, on your return you'll be shown the number and location of any Replies.

- The **Console** displays any video or audio to be played, voting, and PDFs for viewing.

- So for instance a video file could be played by Participants, to Post comments and vote on that video.

- An image can be loaded on to the **Whiteboard** by the Facilitator as a visual stimulus/cue or further explanation of the Topic. **klzii** includes "Stock" images in the Gallery that can be used for this purpose, OR you can design your own and upload on your private Account **Gallery**.

- Private Messaging is available between the Facilitator and Participants, but not between Participants.

Focus-only Chat Room Features

- As well as the above, the small group (maximum 8 Participants) format allows for further unique, creative features, to provide more depth of engagement and insights.

- Each Participant and the Facilitator has their own colour, and an Avatar called **Biizu**, which can be customised for a fun look, and a nickname substituted for their first name.

- The animated Biizu will reflect the emoticon of their last Post in that Topic, show whether the Participant is logged in awake or dozing off-line, and which Topic they're currently visiting. Biizu will also shake when Posting.

- When combined with the Posts/Replies notifications, these elements stimulate interaction, as both the Facilitator and other Participants get a real sense of social conversational activity.

- The **Whiteboard** is fully featured in Focus, enabling real-time drawing and text.

- There are endless creative possibilities for group exercises, including marking up and commenting on brand images, ads, website screen-shots etc which the Facilitator can place on the Whiteboard.

- The individual colours are carried through to the Whiteboard content so you can instantly identify who has made a contribution.
- And the same in the Pinboard where Participants can post an image, as part of an activity, framed by their colour.

Reporting

- Chat Room content can be exported at any time, on-the-fly, in three different formats: **PDF, CSV, TXT**.
- No need to wait until the end of the Session. If the CEO wants an overnight, progress update on a key Topic, it's there instantly.
- PDF is the Exec version with formatting and an emoticon next to each Post.
- CSV is the analysis tool with additional Contact List fields able to be added next to each Post.
- TXT is stripped back to just the Post content for easy conversion to Word Clouds.
- Reports can also be filtered by "Stars-only" which the Facilitator (only - not seen by Participants) can give to Posts of high interest.
- Voting Results and Whiteboard/Pinboard content can also be exported.
- The Facilitator can generate Chat Room Stats of number of Posts per Participant in each Topic, to monitor participation levels, acknowledging top performers, and sending reminders to those not contributing.

Privacy & Data Protection

- **klzii** complies with international standards in privacy and data protection, as detailed in the platform's Terms & Conditions links.
- The Admin backend is tightly controlled so only Account Managers and Facilitators have access to Participant Contact details, and have to comply with the T&Cs.
- Participants only see First Names or Nicknames in Chat Sessions, and cannot communicate with each other privately.
- Observers only see First Names or Nicknames in Chat Sessions.
- Facilitators have the ability to instantly delete any offensive content, and withdraw a Participant from a Session if needed, because of offensive behaviour.

Potential Uses

- The speed, affordability and flexibility of the **klzii** platform opens up limitless possibilities for interaction and application, in all sizes of enterprises and organisations.

- Talking to your influential VIP customers, about their wants and needs is the most fundamental use of **klzii**.

- And if the Facilitator is a company exec, then Participants will feel like they're making a difference by talking directly to someone in charge.

- Sessions could be run for different areas of a business by a front-line staff member responsible for that area e.g. the email invitation could include an image of their business card and/or photo with job title.

- Customers could take part in a brainstorming Session to help with the design of a new product or service.

- New ad concepts could be tested in video, audio or image format.

- Sessions could run in short, sharp duration with many different Participants from your Contact List(s), OR you might have a "control" group of hand-picked customers you can rely on for fast feedback at regular intervals.

- As an example of using **klzii** as a one-stop "drill-down" research tool, you could start with a Recruiter survey for some indicative data on your issues. Then invite those people to a Forum to canvass more about the Why? of those results, and finally go deeper in the tight Focus group format, using the Contact List profiling tools to identify your Most Valuable & Influential Customers.

- All the while you can maintain the relationship with everyone in your Contact List(s) via themed Generic emails, including multi-media capability.

- The same types of activities could be run with staff as an in-house activity, to replace the traditional sleepy after-lunch brainstorming, and internal "suggestion-box" programs that are usually unproductive and only produce complaints.

- The fun, social environment of **klzii** creates positive, motivational energy for people with different interaction styles e.g. some will prefer to contribute ideas late at night or early morning, building on the conversations in progress.

- Our **Community page** at **klzii.com** will provide an ongoing source of tips, tricks and ideas from our users on creative new ways to make the most of **klzii** for fun & profit!