

Serious Specs

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What's Inside?

What's Inside?.....	2
Introduction	3
Quick Overview of How klzii Works.....	3
Detailed Specs.....	4
Accounts.....	4
klzii Roles & My Dashboard.....	4
Tab-1: Account Profile.....	4
Tab-2: Chat Session Builder.....	4
Open & Close Chat Session	6
Tab-3: Resources	6
Chat Sessions & Chat Rooms.....	7
Introduction	7
Common Chat Room Features	8
Social Forum-only Chat Room Features.....	9
Focus-only Chat Room Features	9
Reporting.....	10
Privacy & Data Protection	10
Potential Uses.....	11

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, 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/Host/Time/Date, choose between the formats of **Social Forum** (link to social page), open **Forum** (unlimited Participants) or **Focus** group (maximum 8 Participants), create Topics, customise Emails, select Guests from a Contact List, and invite Spectators.

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

- The **Social Forum, 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 Host, or invited as a Guest or Spectator. All on just one universal email/password with Facebook or Google+ social login options.
- At login, you first go to My Dashboard, and select which combination of Account, Role, and Chat Session you want to enter.

Tab-1: Account Profile

- Upgrade Paid Plan, and purchase further SMS credits (for Focus).
- 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 Social Forum, Forum or Focus format.
- Select the Host from any Contact List.
- (Optional) display only Anonymous code-names instead of first names, for sensitive projects.
- (Optional) select your Brand Logo and Colours for emails and the Chat Room.
- **Step-2:** Create discussion Topics, whether new, Stock, existing Topics from previous Sessions, 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, choose to Show/Hide a Topic and add new Topics.
- Keeping to one idea per Topic, focusses the discussion threads, and 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 Guests, in your style, before being sent.
- It includes the First Invitation (for acceptance & check-in), auto-emails triggered if they select a decline option (Not Now, But Later or Never), and the Session Closed-Thanks email.
- Extra images and video links can be added to any email.
- Incentive, Start&End Time/Dates and Host 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.
- All customised emails are automatically saved for potential future use, along with versions you can pre-set in Resources.
- **Step 4: Select and invite Guests** 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 manual entry, database Import, Survey-Recruiter. Same as in Resources.
- Accept/Decline Responses to the invitation emails are tracked here, so further invitations can be sent to "top-up" the Guest numbers as needed. All responses are written back into the individual Guest'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 Spectators**, 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 Guests, who will not know if anyone is viewing.

Open & Close Chat Session

- The Host can enter the Chat Room at any time to prepare Topics and activities, interact with Guests when Open to them, and produce Reports.
- **klzii** is highly visual and social, so we recommend using Images on the Whiteboard (with real-time drawing & mark-up in Focus), running a Pinboard exercise (Focus), and playing multi-media to stimulate Guest engagement for better results. More in Resources below.
- At the Close of the Session, you can Rate each Guest and make comments on their contribution (never 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 Guest 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 in the Account.
- 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 Survey-Recruiter, or importing an existing database. Note: Social Forum also functions a Recruiter, as set-up in Tab 2 - Chat Session Builder.
- **Survey-Recruiter** is a mini-survey tool that can be branded with your logo. It asks a short set of customised questions both closed and open-ended types, with suggested defaults. Can also include video/audio/images for testing and/or segmenting by responses, and collects future email-permissions to build an instant Contact List from scratch, via a hot-link on your social media, website or email campaign. View-Save Stats of the results and Export the data in CSV.

- Importing an existing database is 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. These also include default Stock Topics with tried & true conversation-starters for a fast set-up.
- **Email Templates** supports one-time preparation of future Sessions by allowing you to customise emails in your own brand style and saving them with unique names. Generic emails can be saved as specific message themes to use as alerts during Sessions, post-Session follow-up on the outcome of the chat, and 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 Email Templates and Chat Room Sessions.

Chat Sessions & Chat Rooms

Introduction

- The **Chat Rooms** are the heart of **klzii**.
- Where your Host and customer-Guests get together to discuss your burning issues, using our unique array of creative, visual & social activity tools to entertain & engage for deeper, more emotional insights.
- Listed below are features common to Social Forum, Forum and Focus formats, and those exclusive to Social Forum and Focus.
- This structure is a path from the fastest-entry Chat Room to the most advanced. Allowing you to have more in-depth discussions as you and your Guests get to know each other better, and become more familiar with the **klzii** environment.

Common Chat Room Features

- **Host Billboard** where conversation-starters are posted, to advise Guests of the activity in a Topic. An additional **Message** can be posted at the top of the Room.
- **Topics** are listed in a drop-down for selection by Guests, and set by the Host for Landing Topic, order, and whether displayed or hidden at any time.
- **Guests 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.
- Topics where they have not yet posted are listed on the menu in yellow, as a reminder to complete all activities.
- Each time someone Posts, a beep is heard, and a number appears 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, you are sent an email notification of any new Posts, Replies or Private Messages. On your return you'll be shown the number and location of the Posts and Replies.
- The **Console** displays any video or audio to be played, DFs for viewing, and Voting.
- e.g. a video file could be played by Guests, to Post comments and vote on how they feel about the video, and comment in a post.
- An Image can be loaded on to the **Whiteboard** by the Host as a visual stimulus or further explanation of the Topic. **klzii** includes "Stock" images/GIFs 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 Host and Guests, but not between Guests.
- When Spectators have been invited, the Host (but not the Guests) can see who's online at any time.

Social Forum-only Chat Room Features

- Guest access to this Chat room is directly via a link posted on your brand's social page, with no pre-qualification and invitations required. Only first name and anti-robot Captcha needed on the way in. Optional link-post design available.
- Once the Guests have completed the short list of Topics (as above), the last screen asks if they're interested in being invited to a Chat Session again. If Yes, they complete a quick form with contact details, plus optional demographics and brand-preference, and entered automatically into a new Contact List. Which makes them available for future Chat Sessions in any format.
- There 's also a facility for adding a Prize-Draw incentive in the social-post, and the ability to export a CSV of all Guests, so you can process fulfilment of the draw.
- This could also be used with an existing database, customers or staff, for a really fast Chat Session, with the generate-Contact List feature turned-off.

Focus-only Chat Room Features

- The small group (maximum 8 Guests) format allows for further unique, creative features, to provide more in-depth engagement and insights.
- Each Guest and the Host 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 Guest 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 Host and other Guest 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 Host 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 Guests can post an Image themselves, as part of an exercise, framed by their colour.

Reporting

- Transcripts of 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 Host (only - not seen by Participants) can give to Posts of high interest.
- Voting Results and Whiteboard/Pinboard content can also be exported.
- The Host can generate Chat Room Stats of number of Posts per Participant in each Topic, to monitor participation levels, acknowledging top performers, and sending email or SMS (Focus-only) 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 Hosts have access to Guest Contact details, and have to comply with the T&Cs.
- Guests only see First Names or Nicknames in Chat Sessions, and cannot communicate with each other privately. Anonymous shows code-names only.
- Spectators only see First Names, Nicknames or Anonymous in Chat Sessions.
- Hosts have the ability to instantly delete any offensive content, and withdraw a Guest 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 needs and the Why of their purchasing behaviour is the most fundamental use of **klzii**.
- And if the Host is a company exec, then Guests will feel like they're making a difference by talking directly to the person that makes the decisions.
- 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.
- You might have an "Advisory Board" 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 Social Forum Session or Survey-Recruiter 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 project, 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.