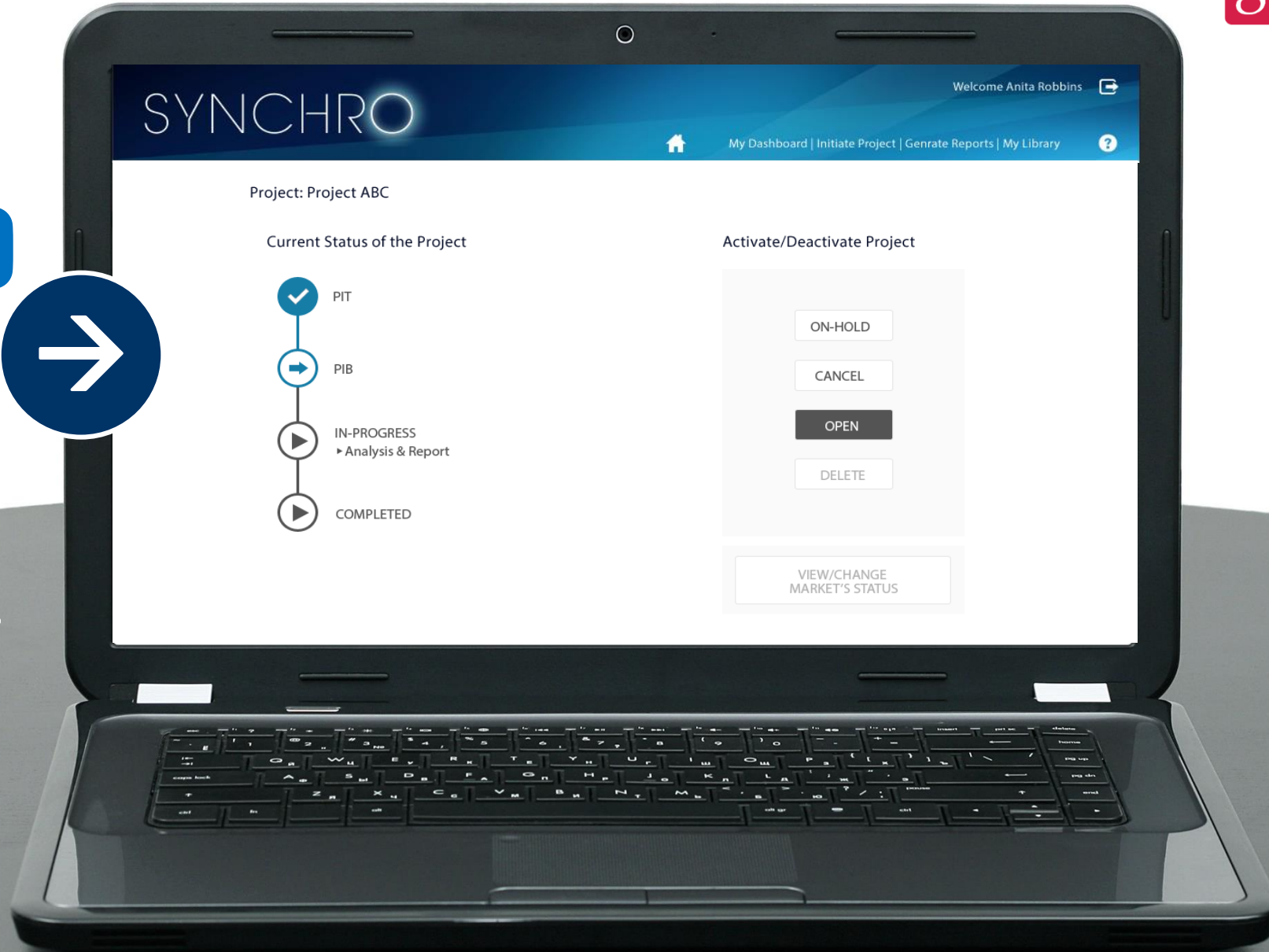


# SYNCHRO UAT SESSION



DECEMBER 2014



## AGENDA >>

### → Look at Evolution of SynchrO

#### ■ Statistics

#### ■ Enhancements









### → User Feedback Received to Date

### → Feedback Session

### → Appendix



# STATISTICS

ENTITY		COUNT
 # OF USERS		799
 # OF PROJECTS		1,596
 Planning		580
 Brief		282
 In-progress		564
 Completed		170
 Grail-handled support requests (ON A WEEKLY LEVEL)		35



# **ENHANCEMENTS**





### **SPEND REPORTS**

Global Users and Super users (Regional, End Market level) will be able to extract reports (either by project spend or aggregated spend at a particular level) based on their responsibility area



### **SUPER USER ACCESS**

This feature enables super-users to access the projects falling under their responsibility area. Please request SynchrO admin team ([assistance@batinsights.com](mailto:assistance@batinsights.com)) if your access has not been configured yet



### **CONFIDENTIAL PROJECTS**

This feature allows to set up a project as 'confidential' by selecting 'Yes' under the 'Confidential Project' field at the PIT stage. A confidential project will be accessible only to those users who are selected for the project



### **PDF EXPORT**

This feature enables a user to export the brief in a well-formatted PDF



### **IMPORT/EXPORT OF BRIEF IN WORD DOCUMENT**

This feature allows tracking of fields that an agency updates in brief (if at all) during the proposal stage. The fields that an agency updates will be highlighted with red border



### TRACKING CHANGES MADE BY AN AGENCY

This feature allows tracking of fields that an agency updates in brief (if at all) during the proposal stage. The fields that an agency updates will be highlighted with red border.



### SINGLE/MULTI MARKET PROJECT INDICATOR IN THE DASHBOARD

A new column is added to the user dashboard to show if a project is for a single market or multi-market.



### STATUS OF A WAIVER

This feature enables to know a status waiver, which is available under the waiver button on the PIB stage



### ATTACH FILE OPTION IN SYNCHRO NOTIFICATIONS

This feature will allow sending attachment in email notifications



### PRINT

This feature has been improved to provide a well-formatted print of a brief



### DEFAULT CURRENCY

This feature enables default display of the currency of a user's country at the project setup stage. If the user needs to use a different currency for the project, they can do so by changing it manually.



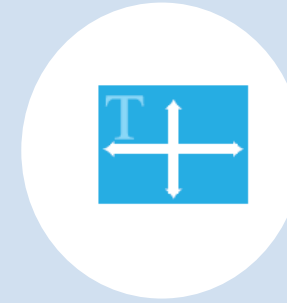
### DASHBOARD SORTING

Users can sort projects by any of the columns available in the dashboard.



### FORMATTING IN THE OPEN TEXT FIELDS

This feature provides formatting options in all the text boxes.



### AUTOMATIC ADJUSTMENT IN THE SIZE OF A TEXT BOX

To overcome scrolling issues in the text boxes and to reduce overall length of a page, a new feature has been introduced in the system, which adjusts the size of all the text boxes based on the text included in it.



### FREEZE PANE ON THE PAGE

For better user experience, the header (with tube map) has been frozen to improve the view of a brief



A blurred background image of an office. In the foreground, a desk is visible with a laptop, a pen, and several documents featuring charts and graphs. In the background, three people in business attire are standing and talking near a large window. A dark blue diagonal overlay covers the right side of the image.

# **USER FEEDBACK RECEIVED TO DATE**

**Reporting** ▶

*"..The tool should automatically rename the new report in order to not create a conflict when opening a new one. .."*

*"I can't seem to find a way to get an overview of the spend for globally driven research by brand..."*

*"When I generate a report with 2 years, e.g. 2014 and 2015, it would be useful to have the years side by side rather than merging them.."*

*"Different currency - local currency, USD - this is crucial to have an accuracy in figures*

*# of project in the separate line.. "*

**Waiver Process** ▶

*"Waiver process does not seem to work that well, markets are not using it sufficiently and we have had technical challenges."*

**Dashboard** ▶

*"I am (SPI person) finding it very difficult to locate the projects that are allocated to me on the projects list..."*



**CAP Rating** ▶

*"...Some projects don't have a cap (e.g. comms / concept testing on existing product). In the cap list, there is a "none" available in the drop down list but we're not able to select it ... "*

**Print** ▶

*"..if I use the print button (without generating a PDF), only the first page is printed. There is no chance to export the whole PIB."*

**Notifications** ▶

*"When you're actually the person creating the PIT, I don't think it's necessary for the system to send you two email notifications per project....."*

**Wish you were  
here** ▶

*"... many people's profile not yet in the system. My frustration was that if I invited someone in a PIT through the wish you were here, I would need to invite him in all the subsequent PITs"*



### SynchrO as a Planning Tool ►

“This is not working and at the moment there are excel documents and off line processes occurring “

“Can we design a planning tool - the information in the PITs... as a draft... summarized as a list for an end market....”

### Reminder and Alerts ►

“.. it would be good if the system would automatically prompt again every 24 hours if I have not done something..... As there are no prompts I simply forget about it.....”

### Project Status ►

Its not always clear as to the status of a project... what needs doing... who needs doing... Is it possible for each project to have a project status tab that clearly shows all this?



Wish you were here ►

*"I'm trying to get the people I have "wished you were in SynchrO" to get their accesses. I have a stakeholder request, but I don't remember who I requested..."*

PO Numbers ►

*"It would also be excellent if you could let me know how to add two PO numbers in one project"*

Stakeholders ►

*"Need to have ability to delegate with system"*

Privacy of Cost in Multi-market ►

*"...local markets access to only costs for their own market and the global user can see everything.....When they are in SynchrO can Italy see Russia costs for example?"*

**NOW**



**Agency Access** ►

*"In my view the Agency has not embraced SynchrO as intended - However, I believe their access is difficult through the token log-in."*

**Other suggestions** ►

*"The tool is good and well managed however due to our ways of working we do not use it to its full potential. At the moment it is not saving time, contrary it has created some duplication. Still it is easier to manage a project and communicate via emails and phones rather than awaiting approvals or proposals coming through SynchrO. Instead of managing a project live in the platform, just uploading all the approved docs in here including the PIB, reports, budgets etc. for archiving and transparency purposes might work better."*

*"I wonder if too many stakeholders are having to signal approval. I have a feeling this is sometimes a barrier."*





MULTI-MARKET PROJECTS	◆ Privacy of Cost
	◆ Draft PIT
	◆ Region/Area option in End-Markets' selection
TRACKING AND REPORTING	◆ Visibility into Project Status
	◆ Tracking of 'Wish you were here'
	◆ Activity Tracking on SynchrO
	◆ Reminder and Alerts Customization
ACCESS	◆ Project Access to additional stakeholders
	◆ Ability to Delegate projects
OTHER IMPROVEMENTS	◆ The process of Non-Kantar agency Projects
	◆ Project Dates
	◆ Advance search
	◆ Dashboard modification
	◆ Additional PO Fields



# **FEEDBACK SESSION**

# OBJECTIVES

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_



 **HAS SYNCHRO MET THE  
STATED BUSINESS  
OBJECTIVES?**

01

**One Common Process (Initiation To Report) For Both Single And Above Market (Multi-country) Projects.  
Do We Want To Break Out Single Vs. Multi Market?**

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02

**Transparency Of Research Plan  
(EM, Regional/Area & Global)**

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03

**End To End Management Of  
Research Process**

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04

**Aid Intra Tracking & Archiving And  
Keeping A Record Of Stimuli**

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05

**Support Group Governance**

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06

**Simplified Waiver Process**

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07

**Reduced Reporting Burden**

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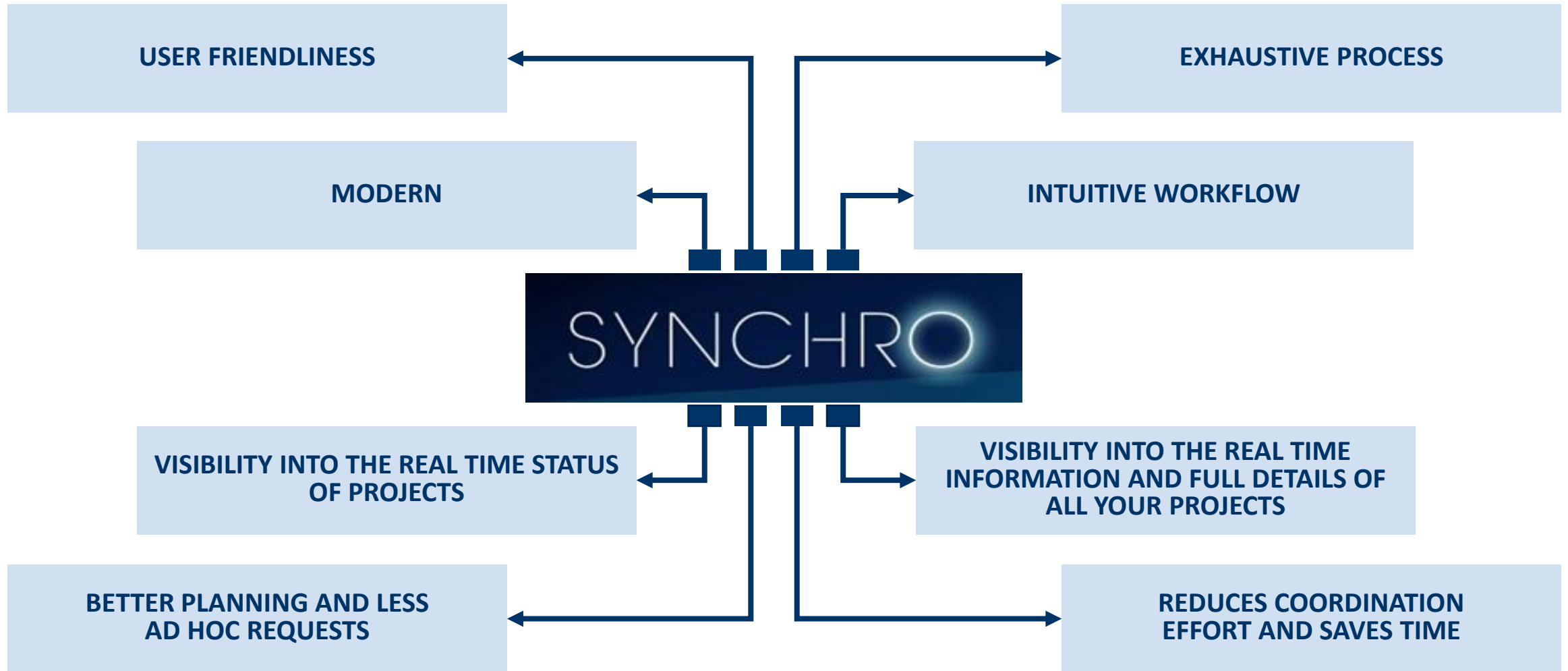
08

**Enhance Agency Interaction**

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■ **HOW HAS BEEN THE  
EXPERIENCE WITH THE TOOL?  
DOES IT MEET THE USABILITY  
ASPECTS?**







 **HAS THE SYNCHRO  
HELPDESK BEEN  
HELPFUL TO YOU?**

**Response Time**

**Resolution  
Time**

**Quality of  
Solution  
Provided**

**Tone & Clarity  
in Language of  
Interaction**

**Communication  
and Follow-up  
on Problem  
Resolution**

**Overall  
Satisfaction  
Level Of The  
Support  
Available**

A collection of 3D black question marks and rectangular blocks of various sizes scattered on a light blue surface. A large, dark blue diagonal shape cuts across the right side of the image, serving as a background for the text.

 **DO YOU HAVE ANY  
OTHER **COMMENTS** OR  
**SUGGESTIONS?****

## Login

Log in using the form below.

**Username:**

**Password:**

☐ Remember Me

[I forgot my password](#)

**LOG IN**

If you are not registered, Please fill in this [application form](#) and send to [assistance@batinsights.com](mailto:assistance@batinsights.com)

**Note:** If you have **not logged in for the past 5 months** your account will be deactivated. Please contact the [administrator](#) to reactivate your account

A person wearing a black long-sleeved shirt is holding a large white rectangular sign in front of their chest. The sign has the words "THANK YOU" written in bold, black, sans-serif capital letters. The person's hands are visible on the left and right edges of the sign. The background is a plain, light gray.

**THANK YOU**

# APPENDIX



Average Score<sup>1</sup> of Respondents on Rating Questions

QUESTION	AVERAGE SCORE (N*=3)
One Common Process (Initiation to Report) for Both Single and Above Market (Multi-country) Projects	4
Transparency of Research Plan (EM, Regional/Area & Global)	4
End to End Management of Research Process	4
Aid Intra Tracking & Archiving and Keeping A Record of Stimuli	4
Support Group Governance	4
Simplified Waiver Process	4
Reduced Reporting Burden	3
Enhance Agency Interaction	3

Note: <sup>1</sup>Respondents were asked to rate how much SynchrO has helped to achieve the following objectives on a scale of 1 to 5 where 1 represents “Strongly disagree” and 5 represents “Strongly agree”. \*Low sample size for the survey

Average Score<sup>1</sup> of Respondents on Rating Questions

QUESTION	AVERAGE SCORE (N*=3)
User Friendliness	3
Exhaustive Process	4
Modern	4
Intuitive Workflow	4
Visibility into the Real Time Status of Projects	5
Visibility into the Real Time Information and Full Details of All Your Projects	4
Better Planning and Less Ad Hoc Requests	4
Reduces Coordination Effort and Saves Time	4

Note: <sup>1</sup>Respondents were asked to rate their experience with SynchrO on a scale of 1 to 5 where 1 represents “Very Poor” and 5 represents “Excellent”. \*Low sample size for the survey