



RELEASE NOTES

## Overview: Introducing ForeSee CX Suite

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FALL 2016

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## 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.

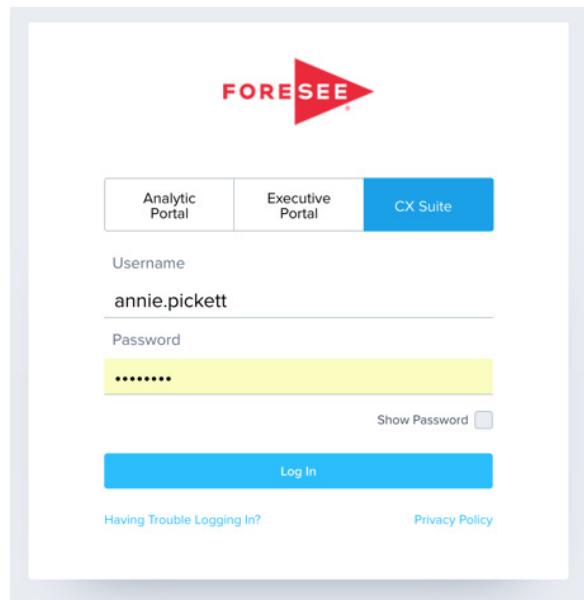
### THE LOGIN PAGE

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.

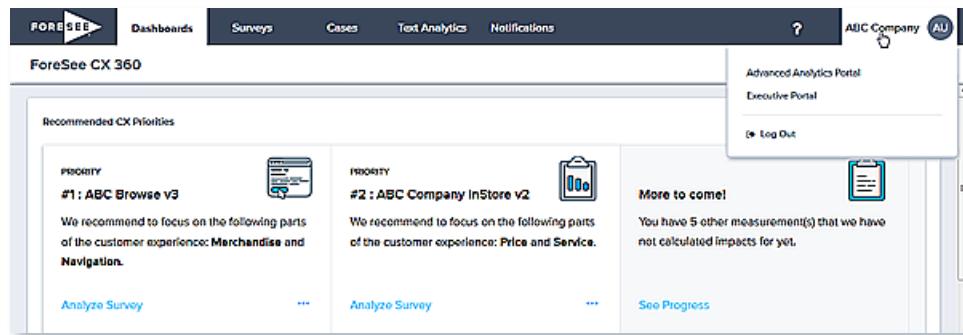
## WHAT'S NEW: FEATURES AND FUNCTIONS

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 screenshot shows the 'Recommended CX Priorities' section of the CX 360 Dashboard. It features three cards:

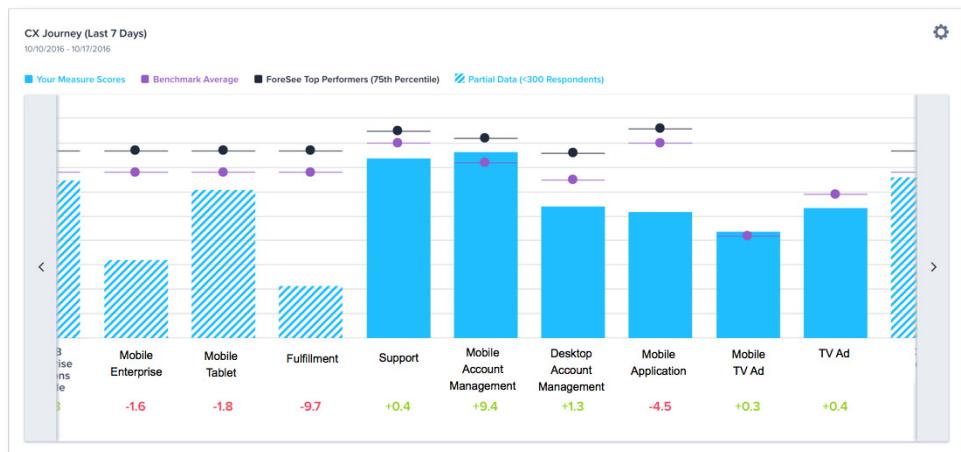
- PRIORITY #1: ABC Company In-Store**: Includes a clipboard icon. Details: Date Range: 08/01/2016 - 09/30/2016, N Count: 425, CSAT Score: 85.3, Priority Index: 5.8, Measure Activation Date: 03/13/2012. A 'More' icon (ellipsis) is shown to the right of the details.
- PRIORITY #2 : ABC Browse**: Includes a clipboard icon. Text: We recommend to focus on the following parts of the customer experience: **Merchandise** and **Navigation**. Buttons: 'Analyze Survey' and '...'. A 'More' icon (ellipsis) is shown to the right of the text.
- More to come!**: Includes a clipboard icon. Text: You have 5 other measurement(s) that we have not calculated impacts for yet. Buttons: 'See Progress' and '...'. A 'More' icon (ellipsis) is shown to the right of the text.

**NOTE:** Currently you have 5 out of 7 measurements that we have not calculated impacts and priority index for yet.

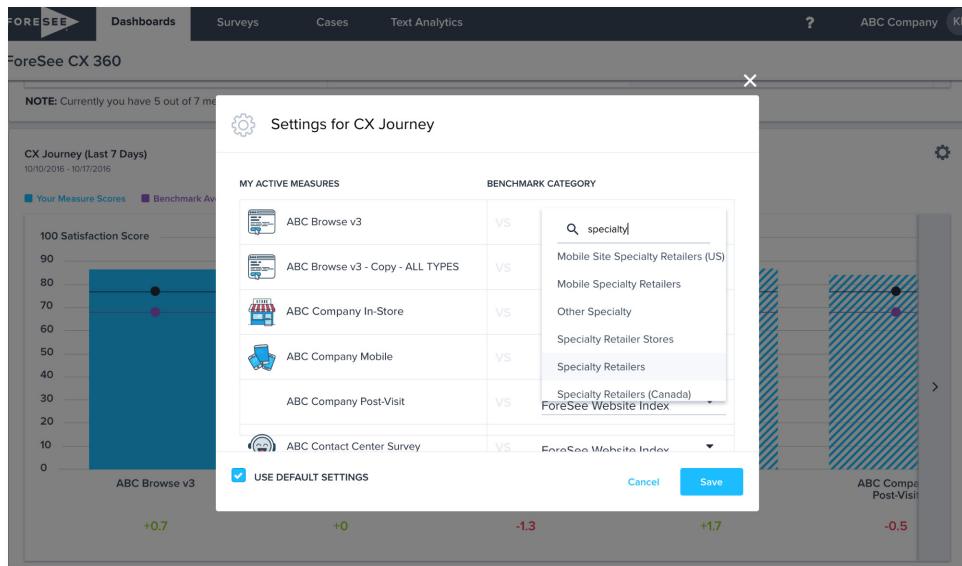
The **Settings** icon (located in the upper right corner of the card) allows customization to hide or show measures, change the **Future Behavior** used on the card, or track the n count of measures that do not have enough respondents to calculate impacts.

The screenshot shows the ForeSee CX 360 dashboard with a modal dialog titled "Settings for Recommended Priorities". The dialog allows users to adjust which measures are displayed in the "Recommended CX Priorities" section by turning on/off switches next to measure names. It includes a note about impacts being unavailable and a checkbox for "USE DEFAULT SETTINGS". A note at the bottom states: "Note: By selecting Default Settings you will lose any custom changes." There is a "Save" button at the bottom right.

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.*

FB Feedback Surveys						<a href="#">Create New</a>			
PROJECT	CREATED	24 HOURS	7 DAYS	CUMULATIVE					
tst	10/16/2016	0	0	0					
testt23a	10/13/2016	0	0	0					
New survey	10/13/2016	0	0	0					
asfsdf	10/11/2016	0	0	0					

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.

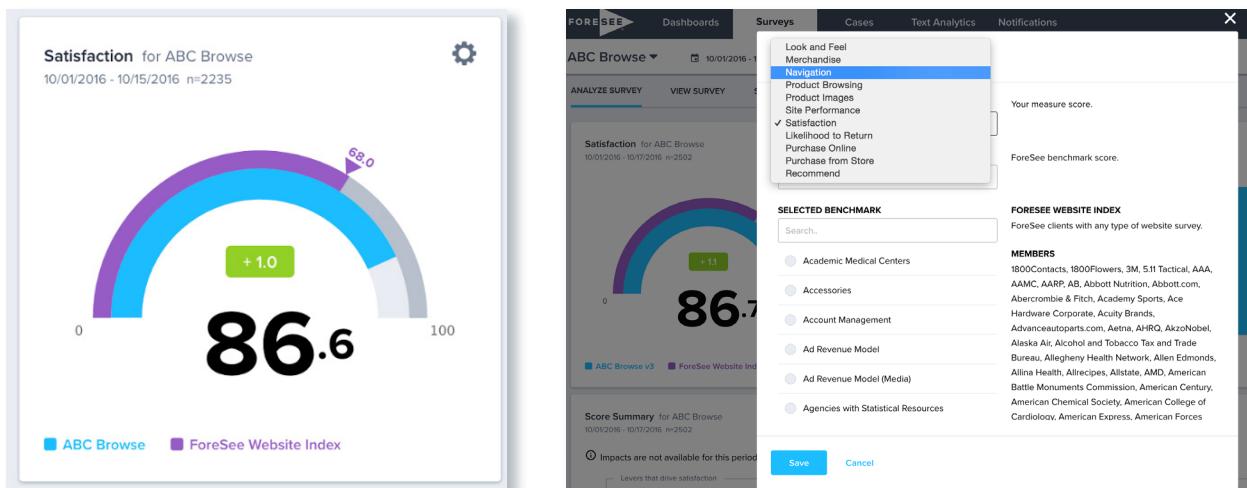
The screenshot shows the Foresee software interface with the 'Surveys' tab selected. At the top, there's a navigation bar with links for Dashboards, Surveys, Cases, Text Analytics, and Notifications. On the far right, there are user profile and download options. Below the navigation bar, there are search and filter fields for 'ABC Browse', date range '10/01/2016 - 10/15/2016', and a 'Add a Filter' dropdown. A prominent blue button labeled 'ANALYZE SURVEY' is at the bottom left. To its right are 'VIEW SURVEY' and 'SEE RESPONDENTS' buttons. The overall layout is clean and professional, designed for easy navigation through survey data.

## CX MEASUREMENT SURVEY

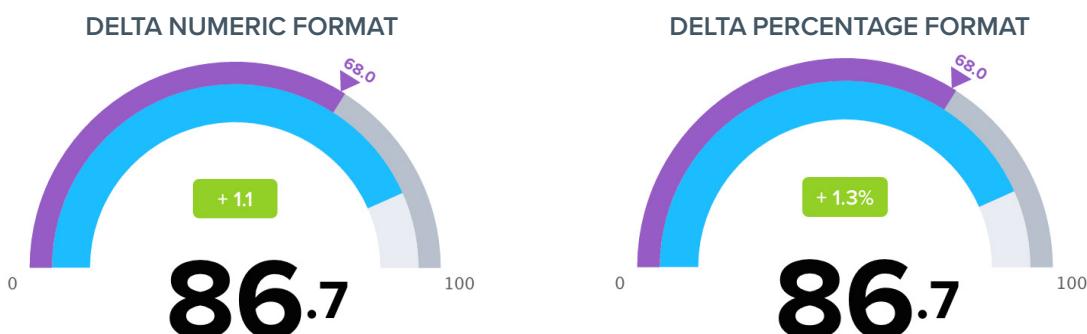
### Analyze Survey

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

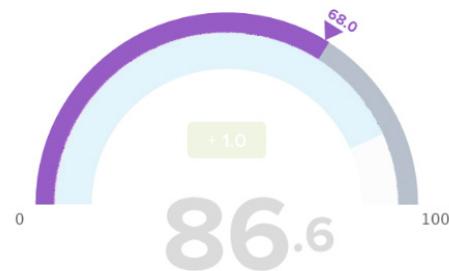
- ▶ **Gauge Card:** How am I doing and how do I compare to myself and others?
  - > “How am I doing...” is answered by the blue band and large numeric score in the center of the Gauge card. The default is your **Satisfaction** score, but you may click the **Settings** icon to select a different score.



- > “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.



- “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.



The screenshot shows the 'Score Settings' dialog box. It includes fields for 'ABC BROWSE SCORE' (set to Satisfaction) and 'BENCHMARK SCORE' (set to Satisfaction). Under 'SELECTED BENCHMARK', 'mobile' is chosen, with 'Mobile' being the selected option. To the right, a 'Trend View' card displays two bars: one for August with a value of 85.6 and one for September with a value of 86.3. The card also lists various companies under 'MOBILE' and 'MEMBERS'.

**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.

**ABC BROWSE SCORE**  
Your measure score.  
Satisfaction

**BENCHMARK SCORE**  
ForeSee benchmark score.  
Satisfaction

**SELECTED BENCHMARK**  
specialty

**SPECIALTY RETAILERS**  
Retail websites that concentrate on a narrow set of merchandise product lines such as apparel or electronics retailers.

- Mobile Site Specialty Retailers (US)
- Mobile Specialty Retailers
- Other Specialty
- Specialty Retailer Stores
- Specialty Retailers
- Specialty Retailers (Canada)

**MEMBERS**

1800Contacts, 1800Flowers, 5.11 Tactical, Abercrombie & Fitch, Academy Sports, Ace Hardware Corporate, Advanceautoparts.com, Allen Edmonds, AT&T, Avid Technology, B & Q, Backcountry.com, Bare Escentuals, Barneys New York, Bass Pro Shops, Bath and Body Works, Beall's Inc., Bell Canada, Bissell, Blinds.com, BonMarche, Boots, Briggs and Stratton, Burlington Coat Factory, Burts Bees, C Spire, Cabela's, Cabelas Canada,

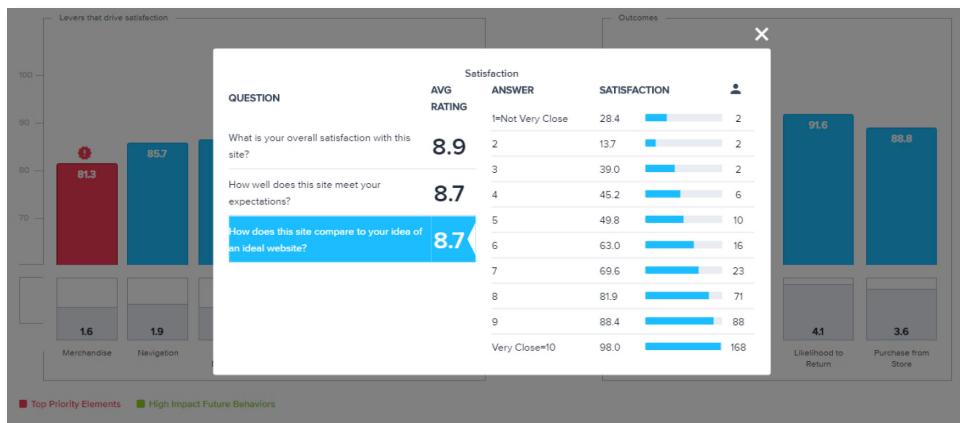
Save Cancel

► **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**.

The screenshot shows the FORESEE interface with a 'Trended Priority Map Settings' dialog box overlaid on a main dashboard. The dialog box contains two sections: 'ELEMENTS' and 'PERIOD'.

**ELEMENTS:** The aspects that define the customer experience.

- Look and Feel
- Navigation
- Product Images
- Merchandise
- Product Browsing
- Site Performance

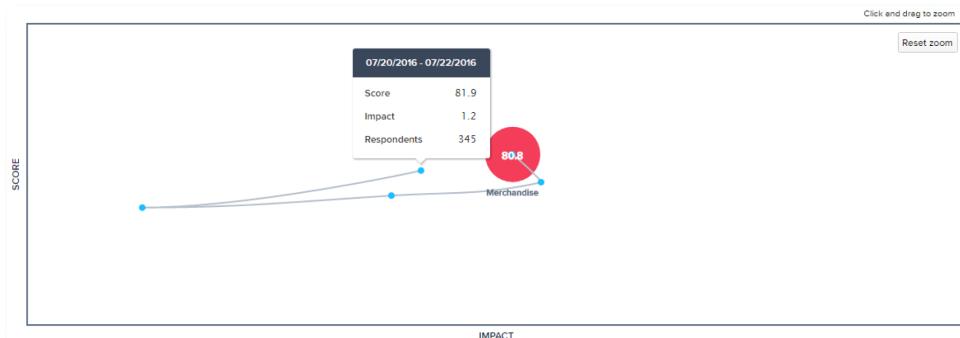
**PERIOD:**

- No Trend
- 1 Month
- 2 Months
- 3 Months
- 6 Months
- 12 Months
- 18 Months
- 24 Months

At the bottom of the dialog box are 'Save' and 'Cancel' buttons.



- > 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.

**Comments for ABC Browse**  
09/01/2016 - 09/30/2016 n=113

SATISFACTION	DO YOU HAVE ANY SUGGESTIONS THAT WOULD IMPROVE YOUR OVERALL EXPERIENCE ON THIS SITE? PLEASE EXPLAIN.	DATE
88	I would love for ABC Company to make more clothing in extended sizes because most of the bottoms run small. It's not fair : (	09/30/2016
100	No I like the site as is that is why I keep returning to buy for by daughter and grandson	09/30/2016
66	Try to add more to the categories. Some categories had too much and some categories had too little.	09/30/2016
73	I really like the recently viewed, but I wish you could look for more than one size at a time.	09/30/2016
88	was happy about the whole experience	09/30/2016

- ▶ “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.

**ABC Contact Center**

**Choose Your Comment Card Details**

**Scores & Details**  
CHOOSE UP TO THREE (3)

**ACTIVE**

Satisfaction (score)  
 browser (custom\_question)  
 url (custom\_question)

**SATISFACTION**

Satisfaction

**FUTURE BEHAVIORS**

Call Again  
 Communicate Experience  
 Recommend

**Elements**

Accessibility  
 Knowledge  
 Professionalism  
 Resolution  
 Response Speed

**os\_name**  
**os\_version**  
**Payment Method**  
**Personal Effort**  
**pointing\_method**  
**Prefer Pay**  
**Reason for Call**  
**resolution**  
**resolution\_height**  
**resolution\_width**  
**screen**  
**screen\_height**  
**screen\_width**  
**survey\_presentation**  
**survey\_submits**  
**survey\_time**  
**Try Pay Online**  
**url**  
**Wait Time**

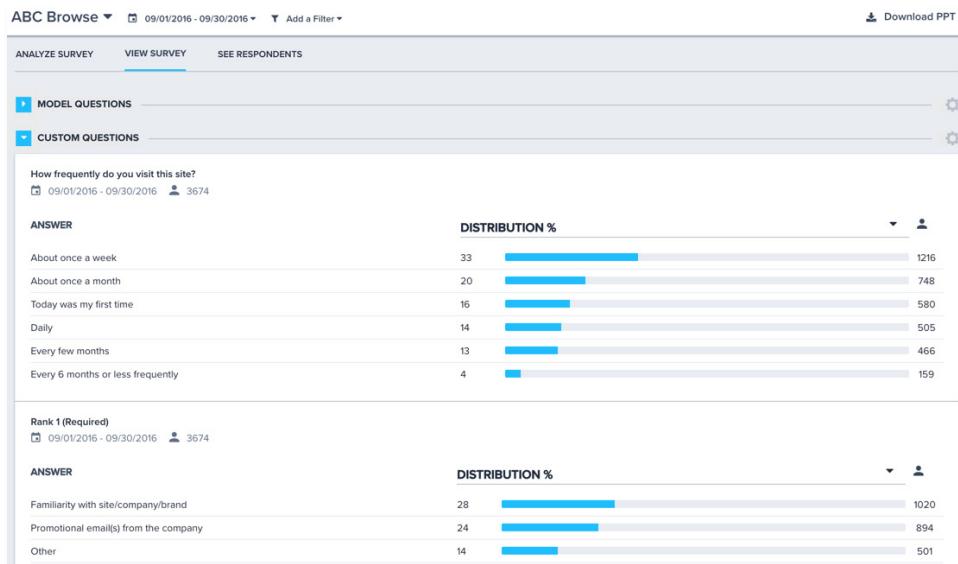
**Comments for ABC Contact Center**  
09/01/2016 - 10/17/2016 n=2673

SATISFACTION	IF YOU COULD SAY ONE WORD, WHAT WORD BEST DESCRIBE YOUR EXPERIENCE?	DATE
96	My experience was great.	10/17/2016
96	I have no complaints.	10/17/2016

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 sign 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.

The screenshot shows the 'ABC Browse' interface with the 'SEE RESPONDENTS' tab selected. The top navigation bar includes 'ABC Browse', date range '09/01/2016 - 09/30/2016', a filter button, and a 'Download PPT' link. Below the navigation is a search bar with placeholder 'Search keyword or user details...'. A dropdown menu shows 'Date - New to Old'. The main content area displays three survey responses from September 30, 2016:

Date	Response Content	Timestamp
100	Nope. Great!! Looking for my daughter some items.Thanks!!	9/30/2016
67	THe customer service is horrible! I missed a promotion of \$20.00 a \$100.00purchase by a few hours and my purc...	9/30/2016
100	none	9/30/2016

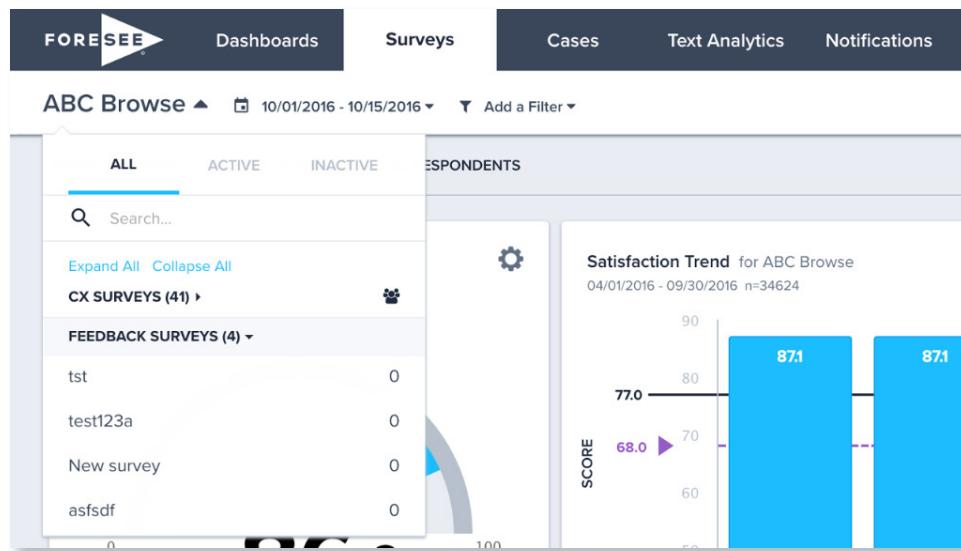
Below the responses, there's a section for 'Survey Response' and 'User Details'. Under 'Survey Response', questions include 'How frequently do you visit this site?' (Daily), 'Rank 1 (Required)' (Promotional email(s) from the company), 'Rank 2 (Optional)' (Internet advertising), 'Rank 3 (Optional)' (Word of mouth recommendation from someone I know). Under 'User Details', questions include 'What is your primary reason for visiting this site?' (Make a purchase), 'Did you make a purchase today?' (No).

## 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.

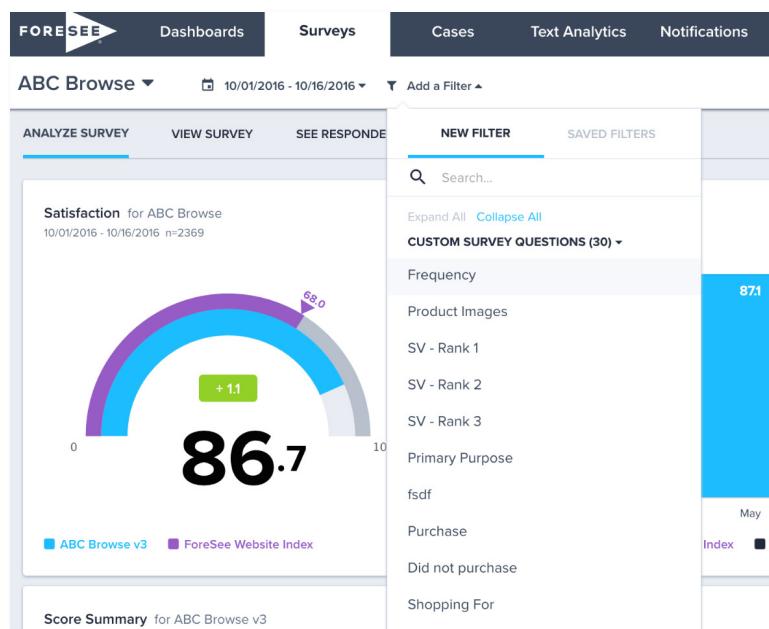
*Note: Feedback date filter remains the same with only custom calendar selection.*

The screenshot shows the FORESEE platform interface. At the top, there is a navigation bar with tabs: Dashboards, Surveys (selected), Cases, Text Analytics, and Notifications. Below the navigation bar, there is a search bar labeled "ABC Browse" and a date range selector showing "10/01/2016 - 10/15/2016". A "Add a Filter" button is also present. On the left, there is a sidebar with various date range options: Yesterday, Week to Date, Month to Date, Quarter to Date, Year to Date, Last Week, Last Month, Last Quarter, Last Year, Last 7 Days, and Last 30 Days. In the center, there is a large calendar grid for September and October 2016. The days from October 1st to October 15th are highlighted in blue, indicating the selected date range. Below the calendar, there is a dropdown for "Type of Calendar" set to "Gregorian" and a "Apply Date Range" button.

## 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**.

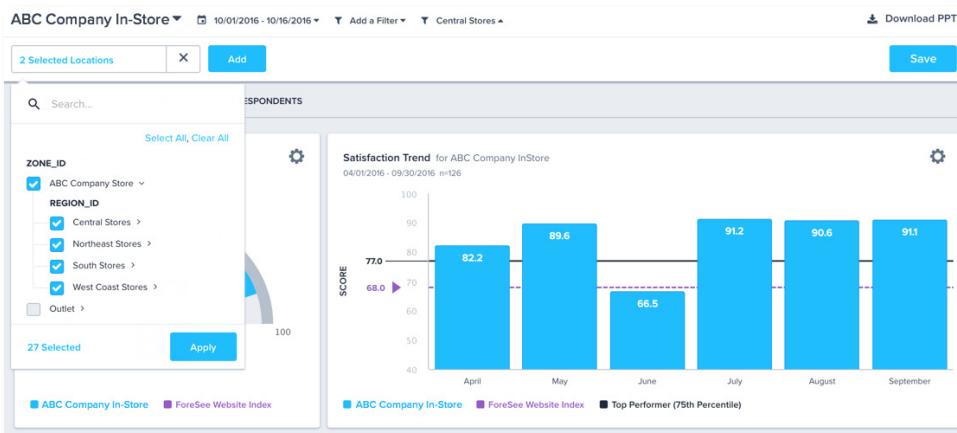
*Note: Feedback filtering remains the same with click filtering within the dashboard.*



## HIERARCHY FILTERS

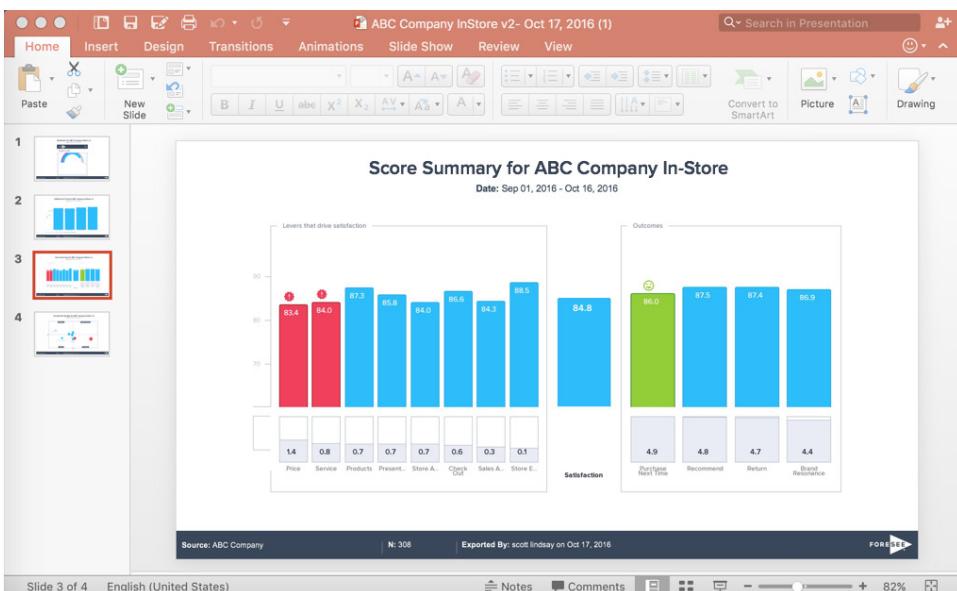
You can now easily drill down a hierarchy tree to find a specific location. The new hierarchy component makes it easy to build new, replace existing, or delete unwanted CX hierarchy filters. **Search**, **Expand All**, and **Collapse All** the layers of your hierarchy to help navigate to the most relevant 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.

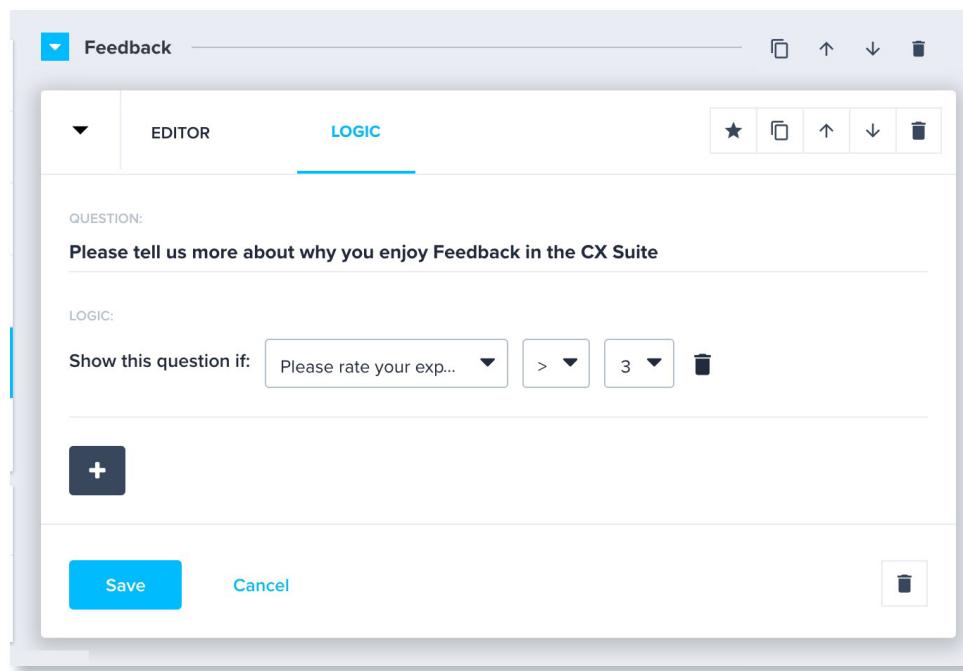
## FEEDBACK SURVEY

### 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.

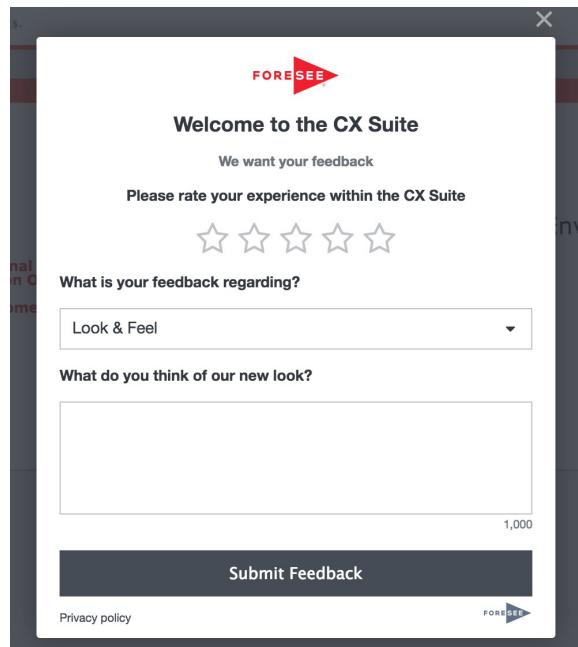
Once **Logic** has been added to questions, you are able to see which questions have logic by the **Logic** icon within the questions.



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.

A screenshot of the Case Management dashboard for ABC Company. The top navigation bar includes "Dashboards", "Surveys", "Cases", "Text Analytics", a help icon, "ABC Company", and a "CB" button. The main header shows "ABC Company In-Store" with date filters "10/01/2016 - 10/18/2016" and "27 Selected Locations". Below is a search bar and a "Create New Case" button. The "MANAGE CASES" section has tabs for "Summary", "Open (2)", "Escalated (0)", and "Resolved (0)". It shows a table with columns: ZONE\_ID, OPEN, ESCALATED, RESOLVED, RESOLVE RATE, TOTAL CASES, PAST DUE, and RESOLVE RANK. The data is as follows:

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.

The screenshot shows a modal dialog titled "Add Case Information". It contains several sections: "Assign to" and "Priority" dropdowns; a "Case Status" section with "Open" and "Escalated" buttons, where "Open" is highlighted; an "Issue Type" dropdown; an "Add Customer Information" section with "First Name" and "Last Name" fields; "Email" and "Phone" fields; and a "Preferred Contact" section with "Email" and "Phone" buttons. On the right, there's a "Describe This Case" section with "Topic Subject" and "Case Description" fields. At the bottom right are "Cancel" and "Create Case" buttons.

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.

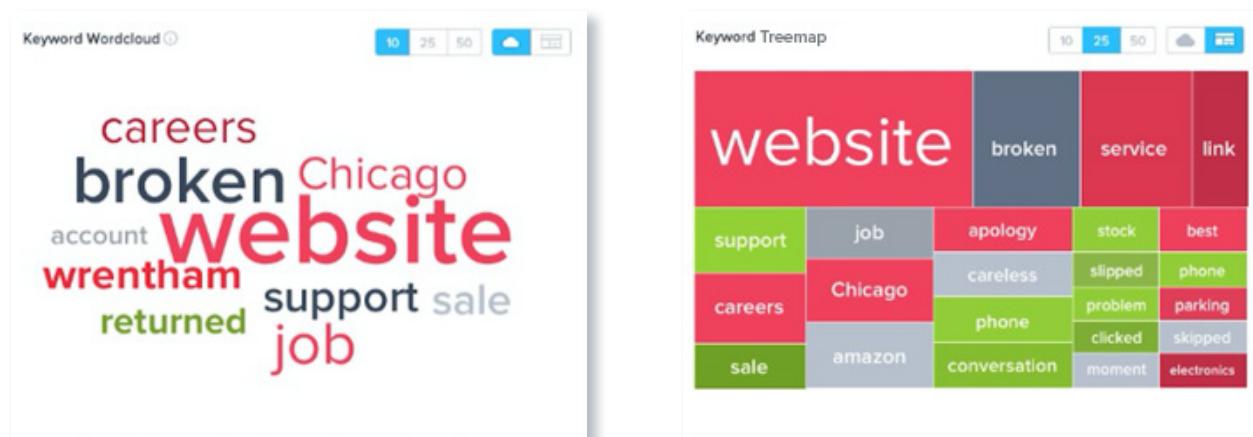
The screenshot shows a detailed view of a case. At the top, it says "Case #ABC-2: Another test case". The main area has a "Case Status" section with "Open" (Due: 10/16/2016) and "Satisfaction Score: --". Below that is an "Assigned To" section with "Stephanie Monte" and an "Escalate" button. There are dropdowns for "Priority" (Low) and "Case Status" (Open). An "Issue Type" dropdown shows "In Store". A "Case Alert" section notes "Manually Created Case". A "Customer" section lists "Jane Doe", "Preferred Contact: EMAIL", "Email: jane.doe@deadwood.com", and "Phone: 734-555-1212". A "Actions Taken" section has a plus sign button. A "Save Changes" button is at the bottom left. At the bottom right, there are "Respond to Customer" and "Internal Note" buttons, and a text input field with "Add your reply here..." placeholder text.

## 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.)

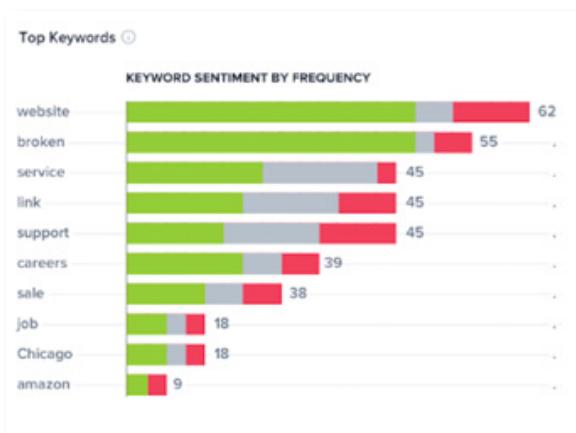
*Example: The word "website" is displayed as the largest word and in the color red. This indicates that many respondents have had a negative experience with the website.*

### 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.

The screenshot shows a list of four comments from different respondents. Each comment includes a yellow circular icon with a score (70, 44, 18, 89), a small emoji, the comment text, the respondent's name (See Respondent), a 'View Replays' link, and the date (02/28/2015 or 02/27/2015). The interface has a header with 'Comments' and filters for 'SCORE: SAT', 'SENTIMENT', and the question itself. A navigation bar at the top right shows '10 comments per page', '1-10 of 145', and a 'DATE' button.

Score	Sentiment	Comment	Date
70	:(	where is my order I havent receive anything yet	02/28/2015
44	:)	Quick Info didnt work, also the select a size did not appear on some items.	02/28/2015
18	:)	I was looking for shirts that my friend bought	02/28/2015
89	:(	I like premium trunks and nowhere did it say so in the description	02/27/2015

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.

The screenshot shows the 'Text Analytics' tab selected in the header. It displays a search interface with a 'Search keywords' input field containing '(ABC Company In-Store)'. Below the input field are three sentiment icons: a green smiley face, a neutral face, and a red frowny face. The interface also includes a date range selector ('10/01/2016 - 10/17/2016') and a 'Add a Filter' button.

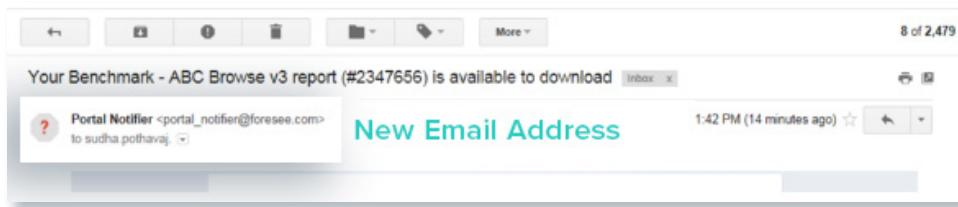
## NOTIFICATIONS

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

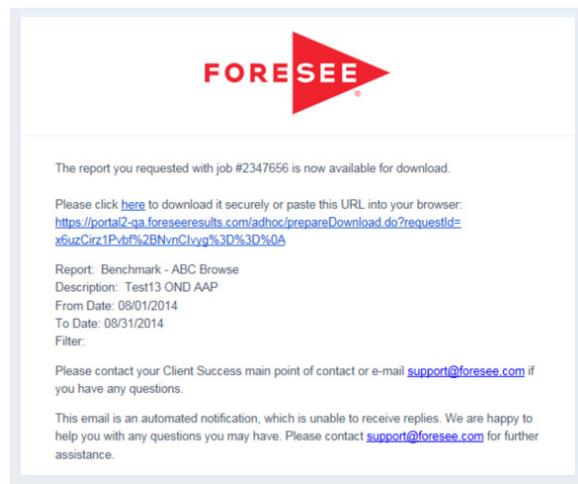
### *Updates to Report Subscription Emails*

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.



## QUESTIONS

- ▶ Please refer to the Help & Training Guide (?) in CX Suite)
- ▶ Contact support at [support@foresee.com](mailto: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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